easy PLANNING

User Manual

TECOMP

Plan with Easy Planning

Easy Planning

Version 7

User Manual

Mars 2014

Edition 54, Mars 2014

CONTENTS

Welcome to TECOMP

Easy Planning is one of the markets most user-friendly programs for planning. The program can be used for Project-, Maintenance-, Resource Planning and for Booking.

Powerful database

Data is securely stored in an Access Database. The database is updated in real time so all users can see the changes. The program has multiuser support and with different permission levels you can control what rights users have.

Simple and clear planning

The planning can be viewed as Gantt Chart, resource view or calendar. You can add individual tasks or subtasks in a project and then allocate these tasks on the resources you have available. Tasks are always displayed in chronological order. If you move a task using drag-and-drop function to a new date is a reordering of all tasks directly in the planning. Workload for resources can be displayed graphically.

Filter and color coding

Tasks can be grouped in different categories where each category is assigned a color. Categories are used to show filtered lists. With filtered lists can show holiday lists, programs, projects, etc.

Sync with Outlook

Easy Planning can sync with Outlook via Exchange, so you can stay updated on your tasks through your phone. The optional software Sync Master running sync automatically in the background.

Import and export

The program has powerful import features to import work orders from external maintenance system.

Our hope is that Easy Planning is going to be the tool that simplifies your planning.

INSTALLATION

System Requirements

Microsoft Windows 95/98/ME/NT/2000/XP/Vista/Win 7 32/64 bit/Win 8 32/64 bit
Color monitor with minimum 1024 x 768 screen resolution.

Installation

The licenses are per user of the system, not concurrent users. If you have a license for 10 users, you have the right to install Easy Planning on 10 computers in your network.

Choose to install the software locally on each user's machine or install the application directly on the server. If you choose server installation you must install the customer part of each customer, this is done only the first time.

You can always do a reinstallation when upgrading without database and schedules files disappear.

Alt A, Install program on a server

Install server version (Server.exe)

The advantage of an installation on the server is that all users are always running the same version and that all new updates only needs to be done on the server. You start the software by adding a shortcut on the desktop to WINEP6.EXE.

Installation av customer parts (Klient.exe)

If you have installed the server version you also need to install a customer installation first time on each user's computer. The customer installation will install locally DLL files and ActiveX components which the software needs to be able to run.

Alt B, Install local version

Install local version (full version)

The software is installed locally on each user's computer. Use this installation for Citrix and other terminal solutions.

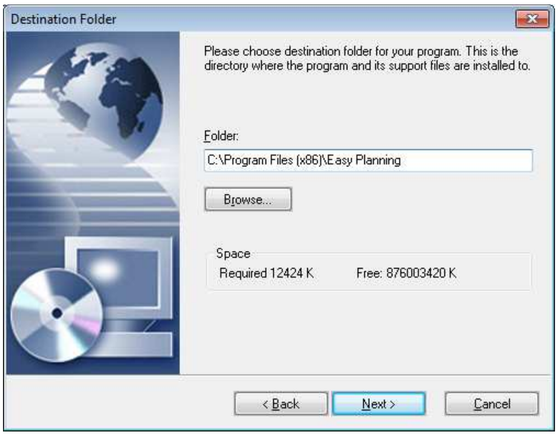
Installation – Demo version

The current demo version of Easy Planning and a user manual is available for download on www.tecomp.se. Click on the link to download and save the file SETUP.EXE on the hard drive.

The following applies to the demo version:

- The demo version can be used until the time limit that shows when you start the program, after this amount of time you can't start the program.
- There is a limit of max 100 tasks. In the full version, up to 100.000 tasks/tables can be added.
- The demo version is limited to five users.

Install the demo version by double clicking on the file SETUP.EXE. After a few seconds, an installation wizard opens that guides you through the installation.



Enter path to database

If multiple users are to work on the same database you would have to assign a path to the data files on the server. The data file consists off a schedule and an associated database.

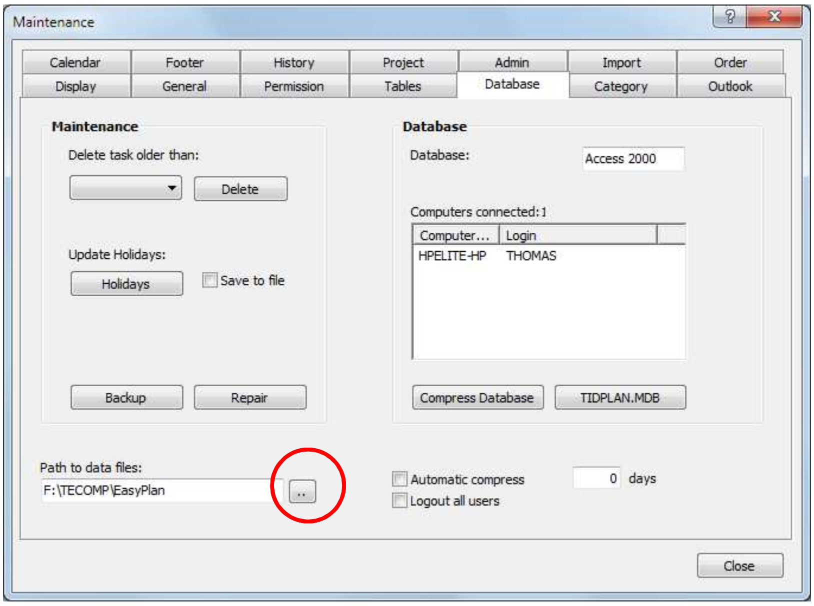
In order to share database and schedule with multiple users you need multiple licenses. A license corresponds to one user, not simultaneous users.

If only one person is using the program you do not need to assign a path to the data files, instead you can store them in a local subfolder of the Easy Planning folder.

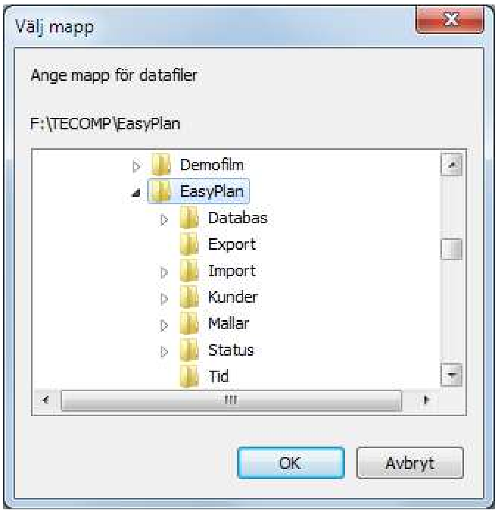
NOTE! As default setting the data files are stored in a subfolder of the program.
C:\Program Files\Easy Planning\Databas

To assign a path to a common database on the server

1. On the **Tools** menu, click **Maintenance**.
2. Login using password **1234**.
3. Click the **Database** tab.
4. In this example we choose F:\TECOMP\EASYPLAN as the path to the data files.
5. If the folder F:\TECOMP\EASYPLAN exists, click on the button to the right of the path.



6. When the form below shows, choose the folder F:\TECOMP\EASYPLAN and click OK.

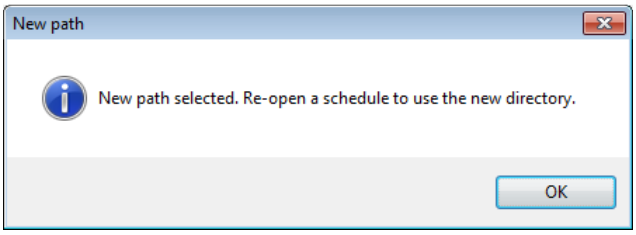


7. If the folder doesn't exist, enter path F:\TECOMP\EASYPLAN.

8. Click OK.

   The program creates 4 folders (listed below) when you click OK.

F:\TECOMP\EASYPLAN	for schedules (CFG)
F:\TECOMP\EASYPLAN\DATABAS	for databases (MDB)
F:\TECOMP\EASYPLAN\STATUS	
F:\TECOMP\EASYPLAN\TID	



9. Next time you choose menu File - Open schedule the folder will be pointing at F:\tecomp\easyplan.

The path is completed and you can start creating your own schedules. The schedules that you build will end up in the folder F:\TECOMP\EASYPLAN and when you open the schedule a database will be created in the folder F:\TECOMP\EASYPLAN\DATABAS.

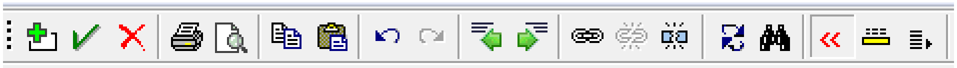
The path to the data files is stored in the file TIDPLAN.INI.

Free Viewer

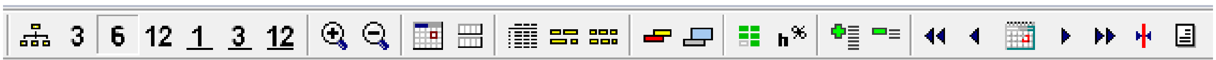
There is no limit to the amount of Viewer users in the system (a Viewer can only look at the planning and mark their tasks as completed). To specify a user as a Viewer choose permission level 1.

Toolbar

Buttons from left to right



New Task
Complete Task
Delete Task
Print
Preview
Copy
Paste
Undo
Redo
Outdent Task
Indent Task
Add link
Delete link
Split task
Outlook sync
Search in Database
View unfinished Tasks
View not assigned Tasks
View Extended time window



Schedule view
Gantt Charts 3, 6, 12 weeks
Gantt Charts 1, 3, 12 months
Zoom In
Zoom Out
Calendar (weekly)
Annual Calendar (yearly)
Resource view 5 days
Resource view 3 weeks
Resource view 12 weeks
View Baseline
View Replanned
Workload by resources
Workload in hours or percent
View all resources
Hide all resources
Backward 1 week/4 weeks
Go To
Forward 1 week/4 weeks
Go to Today
View Report menu

Login

Login is required only to maintenance menu and to schedule builder *).

NOTE! Password is not required in the demo, otherwise default password is 1234

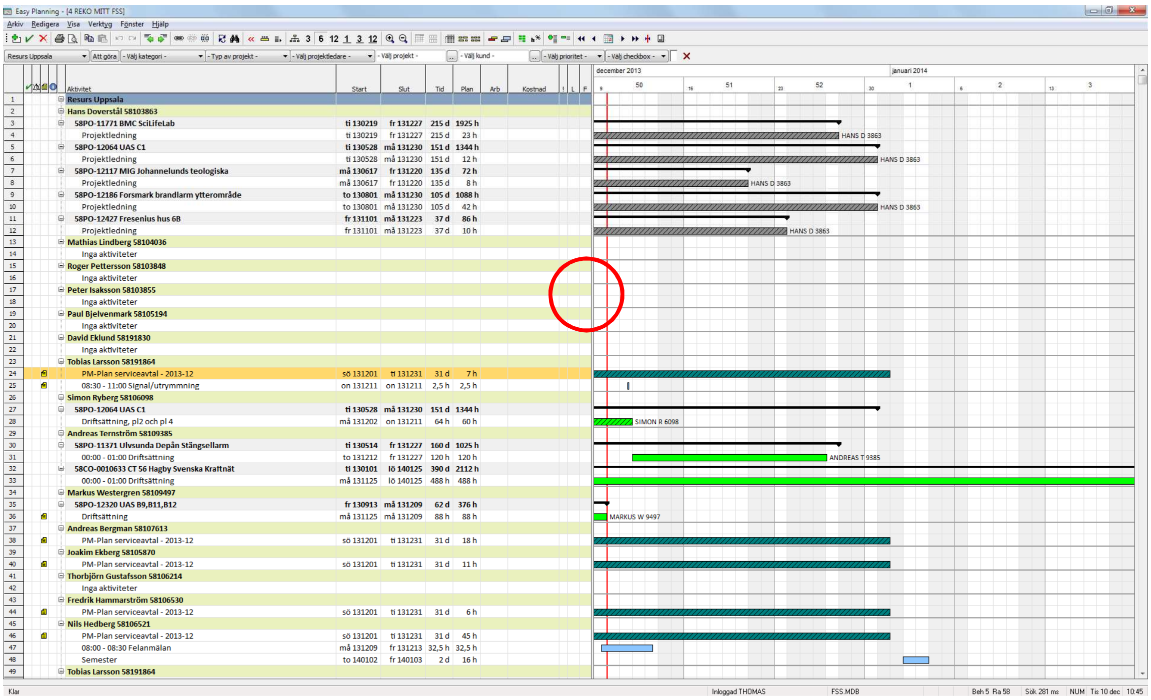
To login

1. Select the schedule view (F2).
2. On **Edit** menu, click **Schedule Builder**.
3. Or on **Tools** menu, click **Maintenance.**
4. Enter password.

*) It is possible to remove the login too the schedule builder, this is done in the maintenance menu, Tool-Maintenance. This change affects all users.

Gantt Chart

The Gantt Chart shows one task per row, except for recurring tasks in a serie and split tasks. You can press the split bar between task name and the bars to move the partition to the side so that several columns can be displayed.

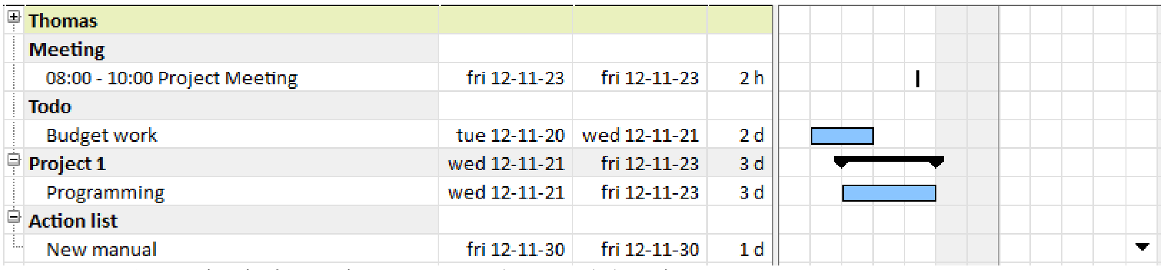


The planning that appears for a resource or a group is divided into 4 parts:

1) Meetings (Appointments)
2) To do (To do)
3) Action list (Events)
4) Project

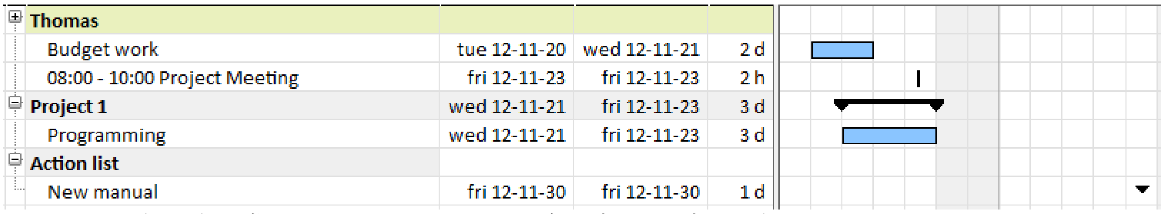
If 'Show headlines for meeting/To do' is selected, they are sorted by group, otherwise put together.

You can view tasks that extend over a long period in a separate action list. Benefit of this list is that it only shows end date instead of a lot of long bars.



Thomas			
Meeting			
08:00 - 10:00 Project Meeting	fri 12-11-23	fri 12-11-23	2 h
Todo			
Budget work	tue 12-11-20	wed 12-11-21	2 d
Project 1	wed 12-11-21	fri 12-11-23	3 d
Programming	wed 12-11-21	fri 12-11-23	3 d
Action list			
New manual	fri 12-11-30	fri 12-11-30	1 d

Figure 1. Task are divided into different parts, here with headines



Thomas			
Budget work	tue 12-11-20	wed 12-11-21	2 d
08:00 - 10:00 Project Meeting	fri 12-11-23	fri 12-11-23	2 h
Project 1	wed 12-11-21	fri 12-11-23	3 d
Programming	wed 12-11-21	fri 12-11-23	3 d
Action list			
New manual	fri 12-11-30	fri 12-11-30	1 d

Figure 2. Without headlines are appointments and to do sorted together

Each project is shown with a project name. You can double click on a project name to show/hide this project and all that comes after in the list. Single click on the sign (+/-) to show/hide only the selected project.

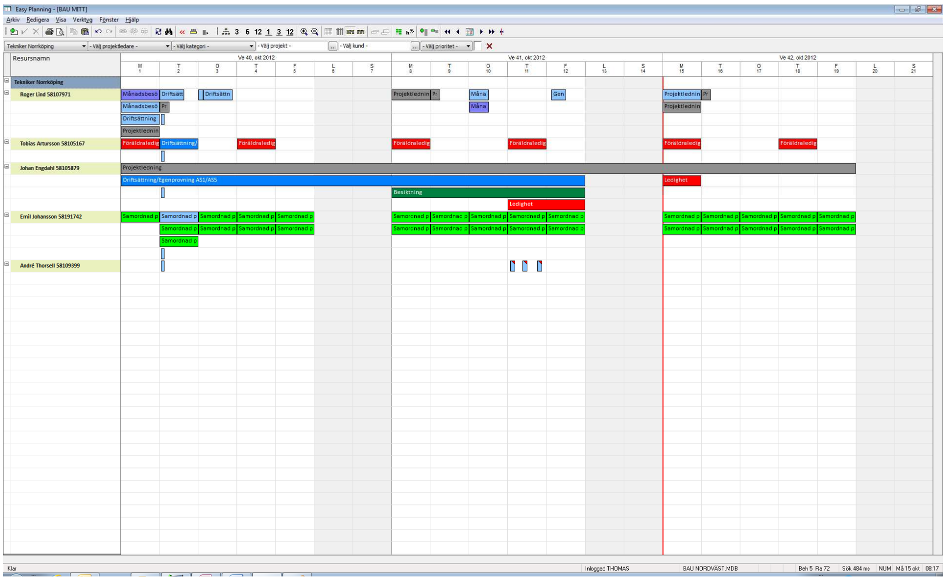
The duration of a task is displayed in the column duration as the number of working days between the start and end dates. In the field planned time, you can specify the estimated time for the task. If the planned time is not set manually the planned time follows the duration, which means 100% workload. If you enter the planned time manually the bar displayed striped.

Duration can be displayed in either days or hours, enter "d" for day and "h" for hours. Hours can be displayed with one decimal place, ex 0.5 h.

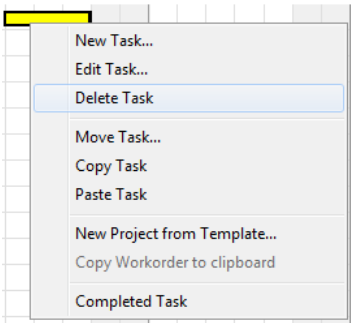
Resource view

Resource view shows all tasks on the same line as opposed to Gantt Chart showing one task per line. If there are multiple simultaneous tasks, they appear on multiple lines, see picture below.

Can be used for all types of bookings, conference, workshops etc.

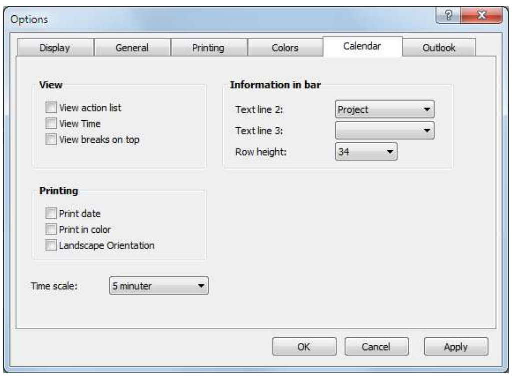


To delete a task in the resource view, right-click on the bar and select 'Delete Task' from the context menu. To finished a task, right-click and select Completed Task.



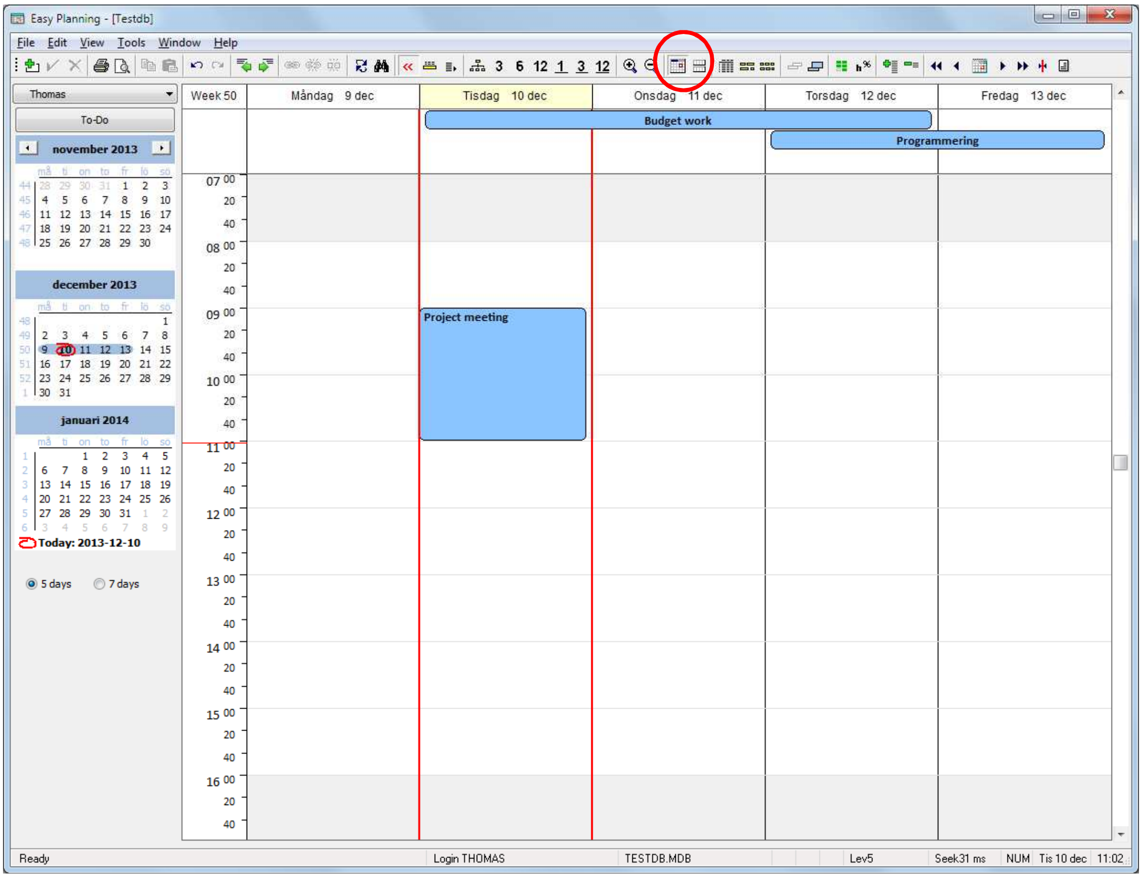
View text in row 2 and 3 in bar

In resource and calendar view, text can also be displayed in line 2 and 3 in bars. For the text to be visible you need to increase the row height. You can change the row height in the menu Tools-Options, Calendar tab. Default value is 24, increase to 34 for 2 lines and 48 for 3 lines.

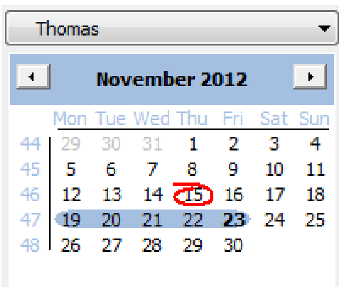


Weekly Calendar

The program has a calendar that shows tasks, events and appointments. The calendar can only be displayed for one resource at a time, at the group level is button calendar disabled.



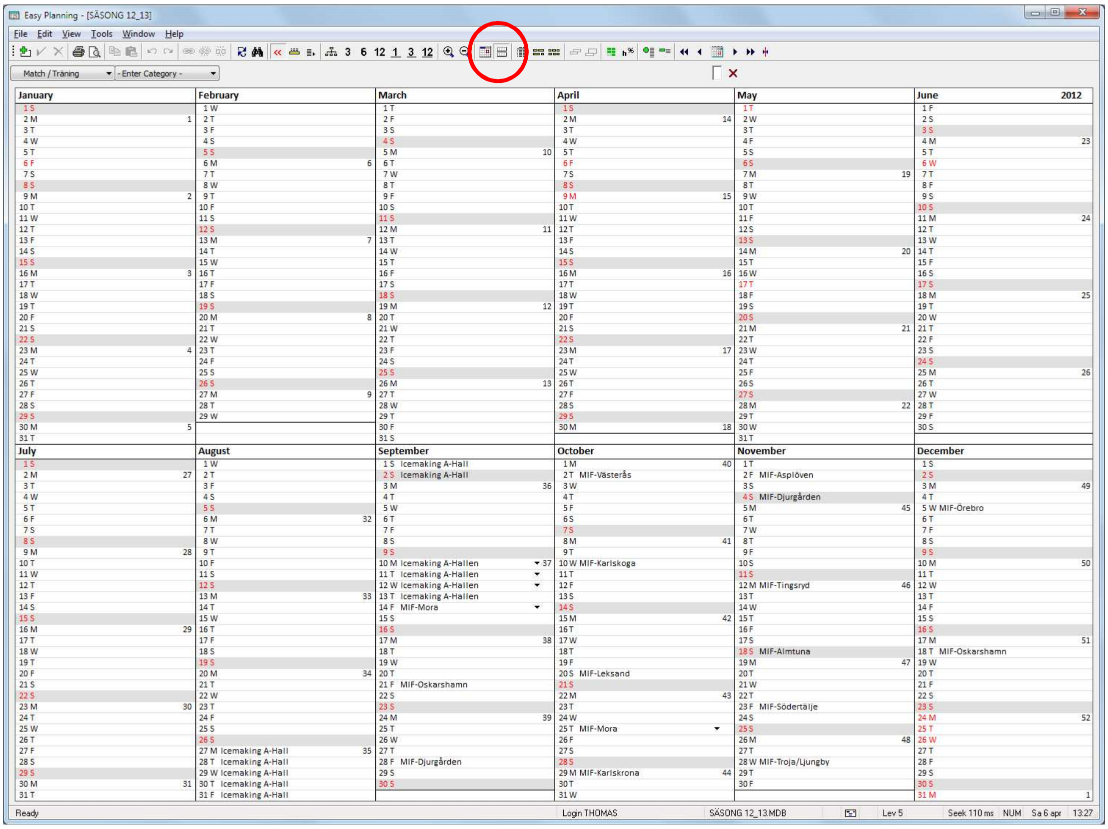
Appointments are shown in bold in the mini calendar. Not valid for tasks that have been marked 'all day'.



Annual Calendar

With the annual calendar, you can view all tasks booked a table for a full year, one task per day. If there are multiple bookings on the same day they are indicated with an arrow. Annual calendar can be used for rough planning where you book the days off.

Annual calendar can only be displayed for one table at a time, at the group level, the button are disabled.



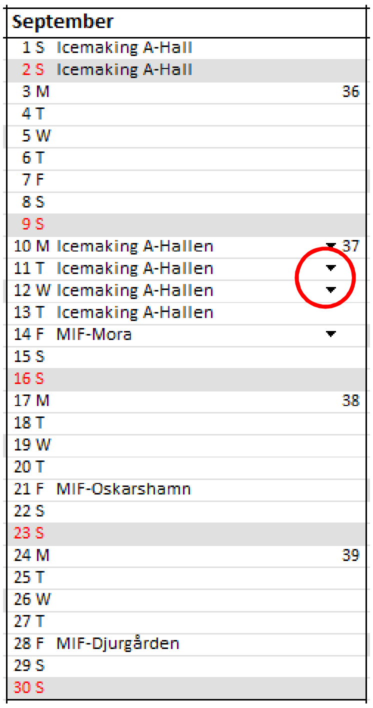


Fig. Multiple bookings one day indicated by an arrow

PERMISSIONS

Setting permissions

The program has five permission levels. In settings you define a permission level for each user.

NOTE! Password is not required in the demo, otherwise default password is 1234.

To setting permissions

1. On the **Tools** menu, click **Maintenance.**
2. Enter password.
3. Click on the **Permission** tab.
4. Select the resource to change.
5. Current permission appears, choose a new level.
6. Click the **Close** button to exit.

Level 1 – Read-only access (Viewers)

Set permission to 1 for Viewers. Viewers can only look in the planning and completed tasks.

Level 2 – Write access to own table

You can only create tasks in your own table, the same table name as login.

Level 3 – Write access to own table and to all linked tables

Same as level 2 plus you have write access to all linked tables.

Level 4 – All rights

You have write access to all tables. Many extra functions require permission 4 or higher.

Level 5 – Admin permissions

You have write access to all tables. Admin is required for the following functions:

- To import
- To delete a project permanently from the deleted tab
- To delete a customers register
- For settings to Sync Master
- To edit Task Name in gantt chart without form
- To show all users in the To-Do list
- To create a copy of the schedule and database

Tables with all permission

Users with permission 2 or 3 get write access in these tables.

Permission by table

You can limit the number of resources that should have access to a linked table. In the **Resources** tab, you can then choose **Only by permission** to view only those resources that are authorized to access the selected table.

Permission by schedule

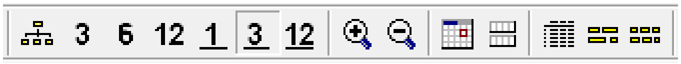
If you have multiple schedules, and want to limit that not all resources can change all schedules you can specify which schedules a resource have access to. The resource will then have permission to these schedules, but read-only access to other schedules.

NAVIGATION

The program always starts with the last open schedule. From this schedule you can navigate to a group (top box in each column), a resource (a box) or the entire planning (box overview).

You change the schedule and database by clicking on the tabs at the bottom of the screen or select File - Open schedule (CTRL-O). Multiple schedules can also be used against a common database.

Easy Planning contains a large number of different views, Gantt Chart (12), resource view (13) and calendar (2). You can quickly switch between the different views with the 14 buttons to the right of the toolbar. Note that the menus on the top row are different depending on whether it is overview or the planning.



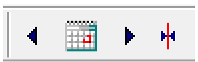
Shortcuts for navigation:

F2	Schedule
F3	Planning
F4	Time Report
F8	3 weeks Gantt Chart
F9	5 days resource view
Shift + F9	Calendar
F11	Zoom in
F12	Zoom out

The first of the 14 buttons show the schedule. From the schedule you can choose a group, a resource or the total planning (overview). The other buttons is enabled when the planning shows and with those you can switch period, view and zooming.

In the list at the top left of the planning view you can easily switch to another resource, group or to overview.

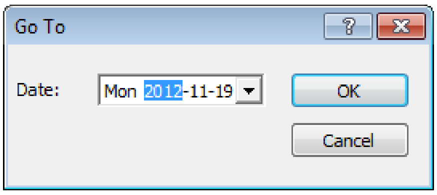
You can move the time period forward or backwards one week at the time. The amount of time depends on the current view, see tooltips.



TIP! Use the arrow keys on your keyboard for fast scrolling.

GoTo function

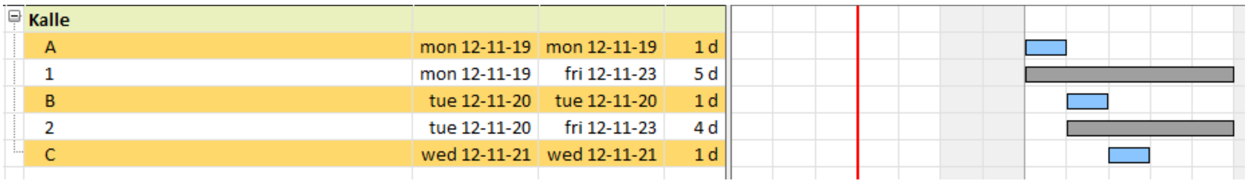
With the function 'Go to' you go directly to the specified date. Choose **Go to** via the toolbar or in the menu **Edit – Go To**. Shortcut F5.

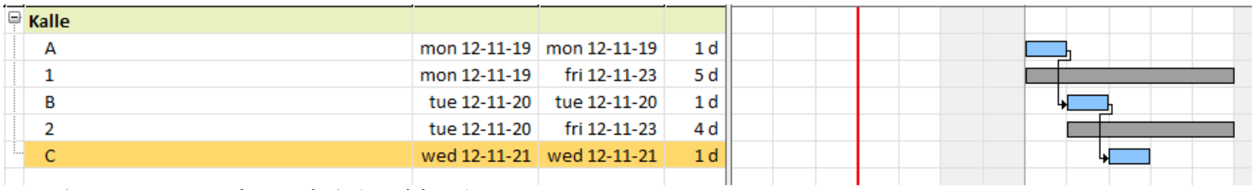


Multi select rows with CTRL

In Gantt Chart you can select multiple rows with the CTRL button. CTRL works for following functions:

- Create links
- Delete Tasks
- Copy Task
- Complete Tasks





Ex. Select row 1, 3 and 5 and click Add Link.

Switching between resource / project by changing table

You can quickly switch between resource and project view by right-clicking and selecting 'View Resource' or 'Show projects' in the popup menu.

Select a task that has an assigned resource and right-click to jump to the resource table.

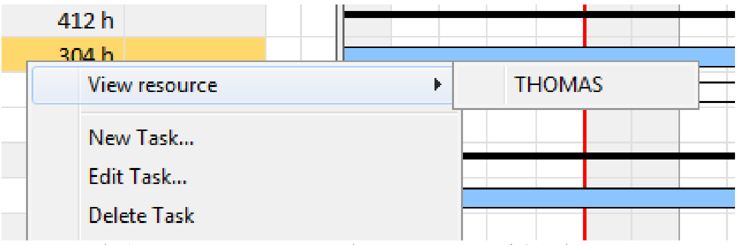


Fig. Switch from one project to the resource table Thomas

Select the project line and right-click to switch to the project table. Filtering is done so that only the selected project is displayed.

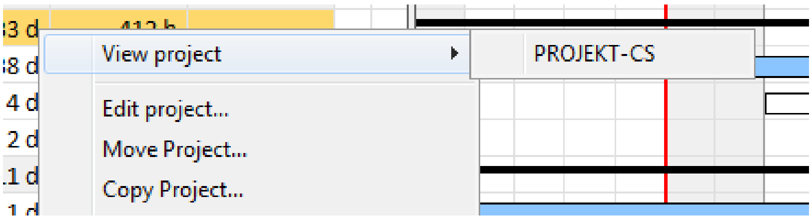


Fig. Switch from resource to the project table

CREATE SCHEDULES

Before you can start planning, you need to create a schedule. The schedules function is to create tables in the database and then from the schedule navigate to a group or a resource.

A schedule contains a number of groups, each with resources. Each box in the schedule creates a table in the database (not the group box).

Clicking on a box collected data for this resource. Clicking on a group collected data from all underlying resources in this group. The top level (overview) shows the overall planning.

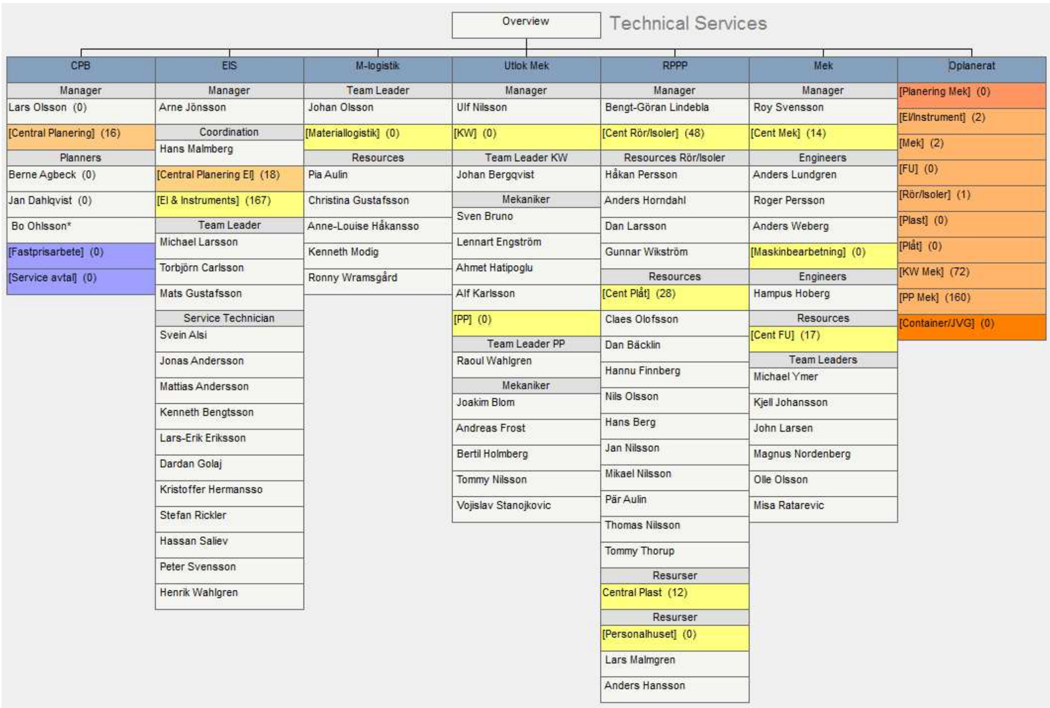


Fig. Sample schedule

The box in the schedule has the following meaning.

Link tables	"[Table]" with brackets
Filtrered list	"**Table**" with **bold font**.

TIP! If you have the program in the folder autostart it will always be running, and you can use the function reminder before meetings.

Create a new Schedule

A schedule can contain up to 601 tables (15 groups each of 40 resources plus a team leader). You use the schedule to navigate to a group or resource.

Create a new schedule with the schedule builder. The schedule which is open when you exit the program automatically opens next time the program starts.

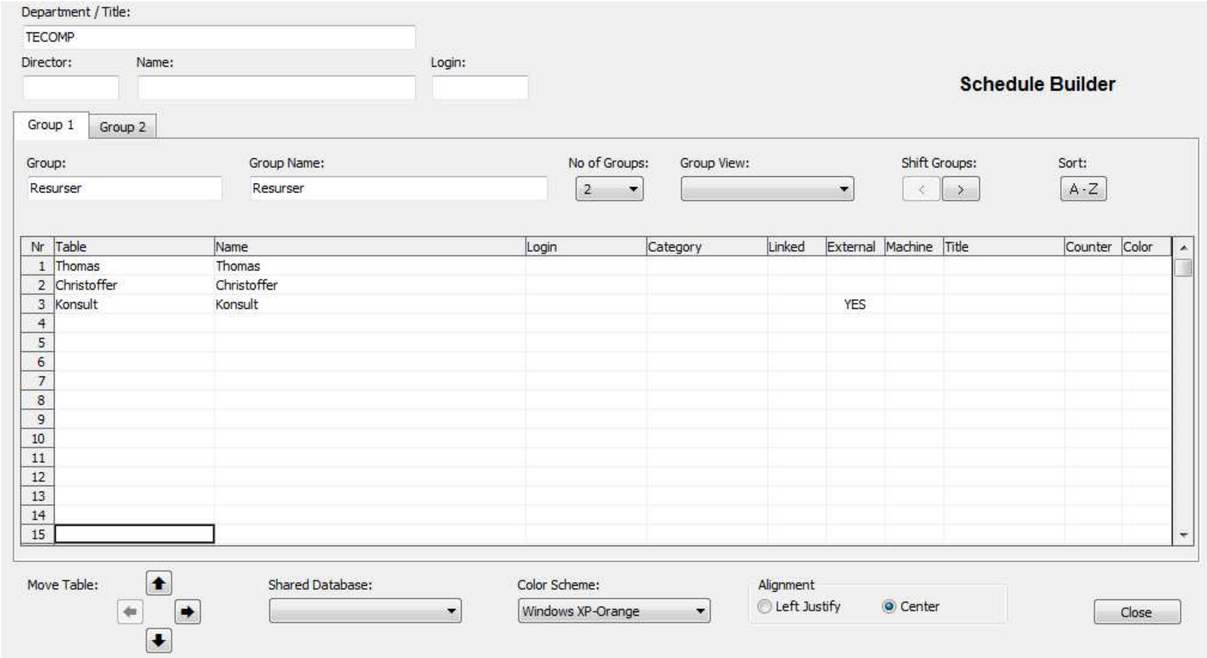


Fig. Schedule builder

NOTE! Enter the password 1234 to login to the Schedule Builder. You can change the password after you have login.

Options in the schedule

The text in the columns Table and Name can be specified with underscore.

The column Table with underscore (ex. Thomas_Ellingsen) shows the name of the table on two rows in the schedule (in the box) but replace underscore with a space when the table is created in the database.

The column Name with underscore (Thomas Ellingsen_070-3965278) gives tool tips in the schedule on several rows but only shows the name until the underscore in the planning views.

The column Color is used to highlight important boxes in the overview, for example projects or incoming jobs. Choose a color by pressing twice in the column color. To remove a color you choose white color in the same column.

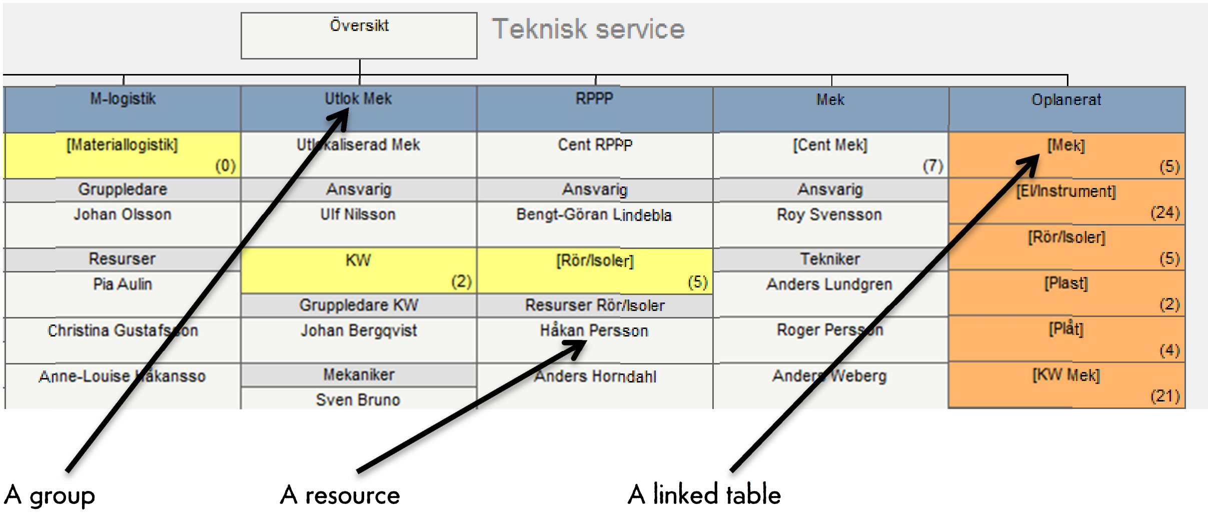
The column Counter is used to show the number of active tasks in the current table. The counter is updated when switching planning/overview and also when automatically updated is activated.

The Schedules parts

The picture below shows a number of groups that have both resources and linked tables. In the schedule builder you create a resource by specifying the table name and the name.

If you select YES in the field Linked you instead create a linked table, marked with square brackets. Linked tables allow you to book tasks in a place (WHERE), and regular tables is then resources (WHO).

The thin gray bar between the boxes called title and used to group underlying boxes.



You can color any boxes in your schedule if you want to highlight these boxes. There is also a counter for each box showing the number of active tasks in this table.

To create a new schedule

1. Select schedule view (F2).
2. On the **Edit** menu, click **Schedule Builder**.
3. Login.
4. Click **New** in the toolbar.
5. Enter a title for the schedule and also ev. name of team leader (can be omitted).
6. Choose number of groups (1-15) and enter group name.
7. Enter name in the column Table and Name. Table is shown as boxes in the schedule image and Name is shown in the planning views.
8. Enter user name *).
9. If filtered list is going to be shown you choose a category in the list. Categories must be created first.
10. Choose YES in column Linked to create a linked table.
11. Choose YES in column External to mark this as an external resource. For Workload reports.
12. Choose YES in column machine to mark the resource as a machine. Affect the calculation of man hours.
13. Enter a title to create a title before the name of the resource in the overview.
14. Choose YES in column Counter to show the number of active tasks in this table.
15. Click on column Color twice if you want to add a color to this square in the overview. You reset the color selection by **choosing white color**.
16. After all information have been filled in, choose **File – Save as**.
17. Enter name of the schedule, maximum of 15 characters. Program adds the suffix cfg.
18. Click **Close**.

*) The column login is used to map a table to a user. Used for functions as reminder, sync calendar with Outlook etc.

NOTE! If you skip a box in a group, the resources that follow in this group will not be shown in the schedule either.

To remove a schedule you delete the schedule file with explorer. Schedule files are in the catalog you specified as the path to the data files and have the extension CFG.

Add a new resource

To add a new resource

1. Select schedule view (F2).
2. On the **Edit** menu, click **Schedule Builder**.
3. Login.
4. Select the first available row in the desired group. Fill in the signature and name and surname. Do you want to place this resource higher in the list, you do so in accordance with the description 'Change resources/groups position'.
5. You can also sort an entire group in alphabetical order using the A-Z.
6. Click **Close** and save the change.

Delete a Resource

To delete a resource from a schedule

1. Select schedule view (F2).
2. On the **Edit** menu, click **Schedule Builder**.
3. Login.
4. You can delete the entire row by clicking to the left of the line (gray matter) and key Delete.
5. If there is a blank line between two resources when a resource is deleted, highlight the blank line and shift this line down past the last resource in the group.
6. Click **Close** to save.

If you want to delete all tasks for the resource you deleted in the schedule, you should also delete the database table with the table name that you removed. See Chapter Settings, tab tables.

Change resources/groups position

You can change the position of a resource in a schedule, both within the group and move the resource to another group.

To change the position of a resource in a schedule

1. Select schedule view (F2).
2. On the **Edit** menu, click **Schedule Builder**.
3. Login.
4. Select the resource you want to move. Click the up arrow key to change places with the resource above or down arrows to change places with the resource below. Right arrow moves to the next resource group, the resource ends up last in this group. Left arrow moves to the the previous group.
5. Click **Close** to save.

If you want to change the order of groups in the schedule, select the group you want to move and click the '**change group**' to the right of the Group View.

To change group order in a schedule

1. Select the group you want to move by clicking on the group tab.
2. In order to change places with the next group click on the right button (switch group).
3. In order to change places with the previous group click on the left button.
4. Click **Close** to save.

Common shared database

Typically, you create a schedule, save it with a name and the database will receive the name of the schedule.

If you instead want to use a common shared database for multiple schedules, you can select the database during 'shared database' in the schedule builder. When you change the schedule by selecting another tab you will remain connected to the shared database.

To use a shared database

1. On the **File** tab, click on **Open** and select the schedule you want to share.
2. On the **Edit** tab, click on **Schedule Builder**
3. Login to Schedule Builder.
4. Select a database from the list 'Shared database'.
5. Click on **Close** to save and exit Schedule Builder.
6. Create a new schedule or choose File Open if you want to change an existing schedule.
7. Repeat steps 4-5 for the schedule you want to change, in step 4, select the same database for all schedules.
8. On the status bar you will see which database is open.

Printing Schedule layout

You can print a picture of your schedule. On the **File** tab, click-**Print schedule layout**. Printing can be done to printer or PDF.

TASKS

Right click in the planning view gives you the most important choice during edit.

Observe that you **do not need to mark on which line** a task shall be added, the tasks are always sorted in time order. Exceptions for marking are in group level where you mark a line under a resource to choose this resource.

NOTE! You need permission level 4 or 5 to be able to change in group level.

Add a task

Shortcut **INSERT**

You add new task by the form New Task.

To add a task

1. On the **Edit** menu, click **New Task**, or right mouse button.
2. Fill in data for the task and click **Save** or key **Enter**.

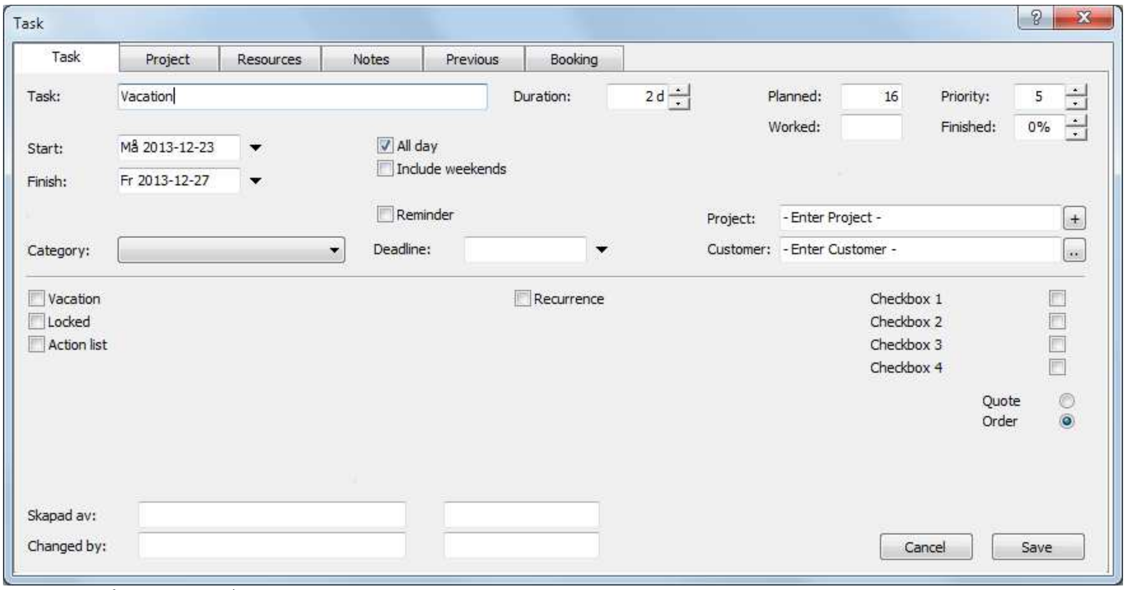
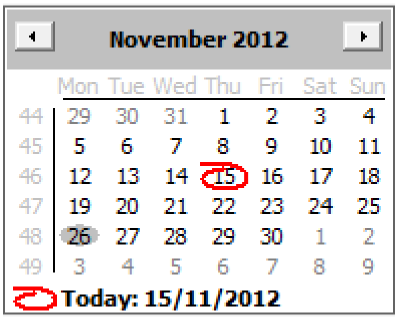


Fig. Form for new task



Task name

Task name, maximum 60 characters.

Start-, finish date

Start, finish date can be entered manually or by choose a date in the calendar (see figure at right).

Category
If you want to search in filtered lists, for example on all courses, choose a category for the task according to the list you have added earlier.

Priority
You can filter by priority, also multiple choices. Default is 5 (1=highest, 9=lowest). For priority 1 there is a red arrow and for priority 2 a blue arrow in front of the task name in the Gantt Chart.

Locked
Mark locked if you don't want to be able to move the task. A task that has a locked date is marked with a squared chart. A locked task can only be changed by the person who locked it, or if you log in with Admin-password. Otherwise you can only see the task as read-only in the form Edit task.

Include weekends
A marking which means that Saturday and Sunday is counted in as working days. For an action to start in a Friday and finish on a Saturday you need to mark include weekends.

All day
Remove the marking All day if you want to add an appointment with time of day. Enter time and mark reminder if you wish to get a reminder. The reminder function is activated even if you work with other programs, provided that Easy Planning is running.

Action list
When you add a task which is going on for a longer period you can use the marking Action list. Instead of showing a long chart the task only shows an end marker in image and print.

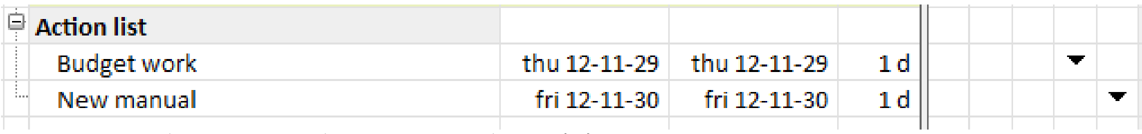


Fig. Action list shows tasks with a marker on the end date

TIP! You can make a search in the database after all tasks in action list.

Recurring
If you want to add a recurring action you mark recurring and choose how often (range) and the last date of the series. Ranges can be days/weeks/months or years.

Project
The project tab is used to add information about a new project:

- New project or select an existing project
- Project Description
- Project Manager
- Budgeted time on project
- Deadline
- Color of the project, otherwise black bar

Project information is for all the tasks you later add that belong to the same project. You add a new subtask by clicking on the tab projects and select a project in the project list.

You can choose to display the list of projects directly on the first tab.

If you select the quote, projects will be displayed with a transparent background, you can later switch to orders when quote enters an order. You get in this way a quick overview of all quotes and orders.

Optional
The option extends the functionality of the form New Task. They are enabled in the maintenance menu, view tab.

Options are as follows:

- View projects
- View Customers
- View Cost
- View Article parts
- View Order number
- View Calendar
- View Owner
- View Ordered by
- View Competence
- View Prepare Tab
- View Improvements Tab
- And checkbox 1-4

Costs
You can specify a cost for each task. Choose between a fixed cost or variable cost. The variable count cost on the number of hours x hourly rate. Hourly rates are a basic value without category selected (can be changed) and an hourly rate per category. The cost added up per project and even per table.

Calendar
Select between day (8 hours), two shifts (16 hours) or 24-hours calendar. Appointments over several days counting duration 8 hours if calendar 8h is used. Start at 2 pm and end at 10 am the day after then provides 4 hours of calendar 8h. The calendar 24-hours gives the duration of 20 hours.

Change a task

Shortcut **F7**

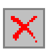
To change a task

1. On the **Edit** menu, click **Edit Task** or the right mouse button.
2. Change the information and click **Save**.

Delete a task

Shortcut **DELETE**

To delete a task



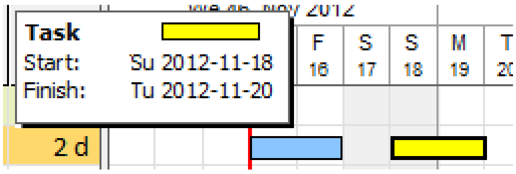
1. Select in the column Task the tasks that to be deleted.
2. Click **Delete**.
3. Confirm that you want to delete the selected tasks.

Move a task

Select a bar in the Gantt Chart with the mouse and hold the mouse to move with drag-and-drop operation.

To move a task

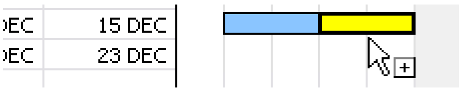
1. Point to a bar, the cursor displays as a two-way arrow. The task can be moved forward or backward in time.
2. At group level with permissions 4 or 5, the cursor displays as a four-way arrow. The task can also be moved from one resource to another resource in the vertical direction (not for recurring).



3. Hold down the left mouse button and move right or left. The new start date is displayed in a separate window.
4. Release the mouse button on the desired date.
5. Another way to move an event is too choose Edit – Edit Task, or the right mouse button. Enter the new date on the form displayed.
6. You can also move a task to another table by right-clicking and selecting Move Task. Requires permission level 4 or 5.

Copy a task

Create a copy by holding down the CTRL key while moving the bar.

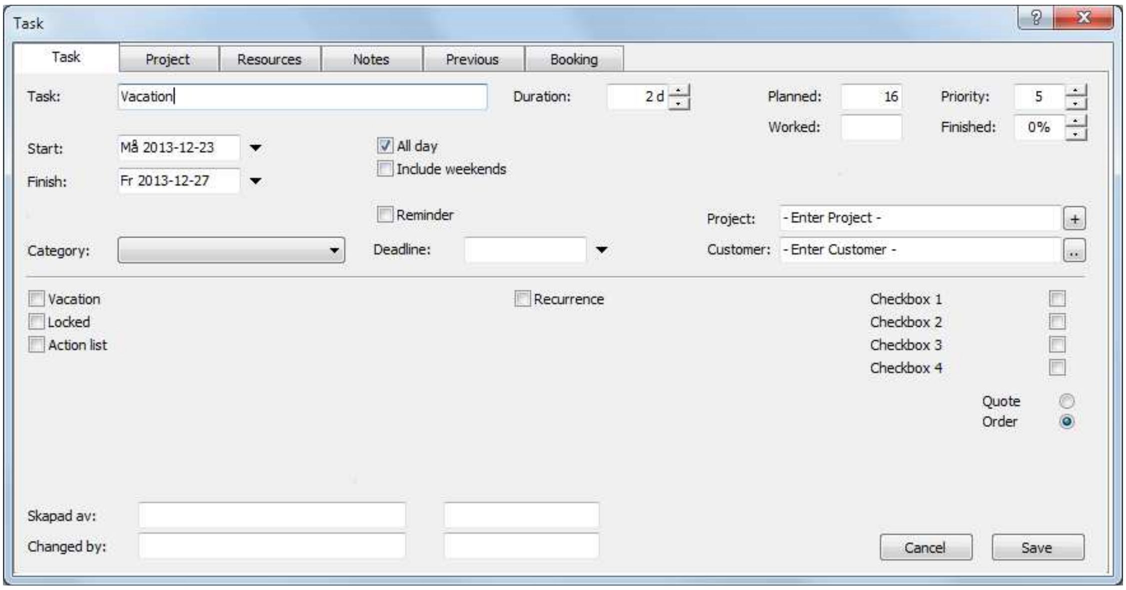


Change duration on a task

Change duration on a task by pointing to the beginning (start date) or end (end date) and use drag-and-drop function. Mouse cursor appears as a left or right arrow.

Set time on a task

You add new tasks through the form New Task. The duration can be specified in several different ways, we describe some variations.



A. All day event

Enter the task name, start and finish time. The task will be displayed as a bar from start to finish time. Duration is always length from start to finish. Planned time can be the same duration (100%) or you state the scheduled time, ex 8 hours for a job that should be performed between Mon-Fri.

If the planned time is not the same as duration a **dashed bar** will appear.

B. Calculated end date

Applies a task with a planned start time and expected to take x hours.
Enter task name and start time, finish date deleting. Enter the time in days (d) or the number of hours (h). The end time is calculated on the number of hours allocated to the selected calendar (the parameter "number of hours per day"). Default is calendar day 8 hours/day.

C. Calculated start date

Applies a task to be completed specified finish date and expected to take x hours.
Enter the task name and finish date, delete the start date. Specify the time in days (d) or hours (h).

D. An appointment

Applies to meetings and appointments.
Enter the start date and uncheck "All Day". Choose time for the start and end date. The duration in hours is calculated automatically.

E. Time Measurements

Valid for tests that will take exactly x hours.
Enter the Start Time and uncheck "All Day". Then select the time of the start and delete end time. Then enter the number of hours (h) as the end time is calculated based on the number of hours divided by 24 hours (number of hours per day must first be set to 24). You can calculate the start time in the same manner with an end time, and number of hours.

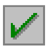
Shortcut **END**

Completed task

Acknowledge a task by selecting completed or set 100% complete. Acknowledged tasks are time-stamped with the current date and the name of the person who acknowledged, see the field changed by.

Late tasks, when a task passes deadline and is still active, the end date marked with a red ring. Tasks that are not acknowledged (active) and are before the time period shown are marked by the symbol << (in Gantt Chart). When the task is acknowledged the bar displays a black line and the first column displays a green tick.

To complete a task



1. Select one or more tasks to be acknowledged.
2. Click **Completed Task**.
3. Confirm.

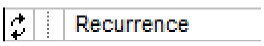
To restore a completed task

1. Select the task and press key F7 or double click.
2. Uncheck **Finished** and click **Save**.

Recurring tasks

Recurring events can be set at intervals of days/weeks/months or years. Tasks will be linked to a series which means that you can change or delete all the tasks in this series from the selected task and forwards.

A recurring task shows with a circle symbol that the task is recurring. You can move any sub-task in a series by double-clicking on a sub-task (bar) or by using drag and drop.



Reminder

If you choose reminder, a reminder window "pop up" even if other programs currently in use, provided that the Easy Planning is running. You may only reminders of the tasks that belong to you, the table you mapped to your user name.

In schedule builder, enter your user name in the field "login" to map your table.

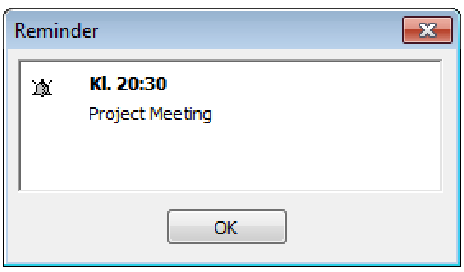
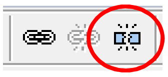


Fig. Reminder before a meeting

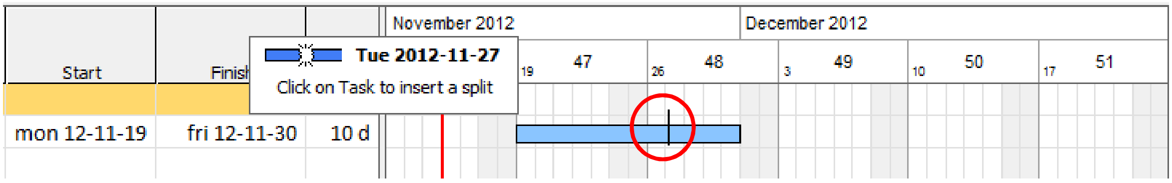
Split a task

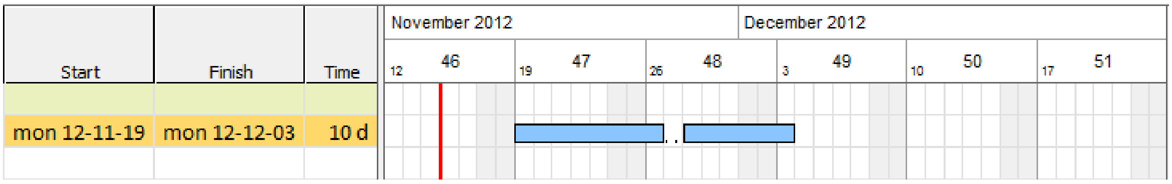
If you need to interrupt work on a task, you can split the task so that part of it starts later in the schedule.

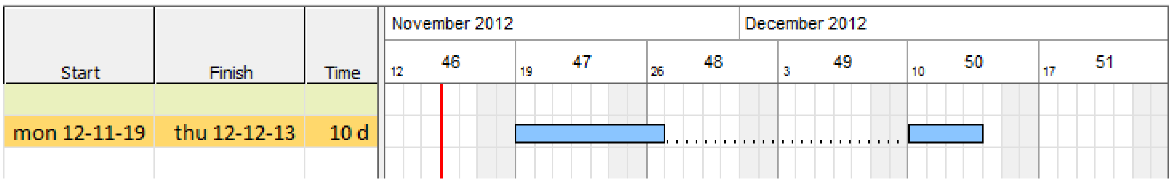


To split a task

1. Select a Gantt Chart.
2. Click on key **split task**.
3. On the task's Gantt bar, click the area of the bar on the date where you want the split to occur, and left click.
4. Split is made one day apart.
5. Drag the second part of the bar to the date that you want work to begin again.
6. You can split a task multiple times.







You can split a task into how many parts anywhere but a bar must be at least two days long in order to be able to split. If you drag a portion of a split task and drop it directly next to another portion, it will be merged into the other split task portion.

Each part is a separate task, which means that they can have different task name, category, resources, etc.

Undo/redo

Shortcut **CTRL + Z**

You can undo recent changes by clicking on the cancel button or pressing the keys **CTRL + Z**. Undo can be done for the last 10 changes.

Shortcut **CTRL + Y**

You can redo the last change you undone by clicking the redo button or pressing the keys **CTRL + Y**. Redo can be done for the last 10 changes.

NOTE ! Undo function is reset when you change to a new resource.

Cut - Copy - Paste

For functions cut - copy regards that up to 10 tasks are stored. This means you can copy up to 10 tasks at a time. However, you can cut or remove more than 10 tasks at a time.

Cut

Shortcut **CTRL + X, DELETE**

Delete the selected tasks. Use **Delete** when you want to delete a task. The task is placed in the clipboard and can be restored with paste. Multiple tasks can be deleted simultaneously. You can also delete tasks from the menu Cut.

Copy

Shortcut **CTRL + C**

Create a copy of selected tasks, up to 10 at a time. Use the **Copy** button to copy a task to multiple people. For series regards to copy and paste creates a new series.

Paste

Shoprtcut **CTRL + V**

The tasks stored in the clipboard are pasted into the current table with the **Paste** button. The task is added to the planning of the same text, date, number of hours, etc. as the original.

PROJECT

A project consists of one or several subtasks.

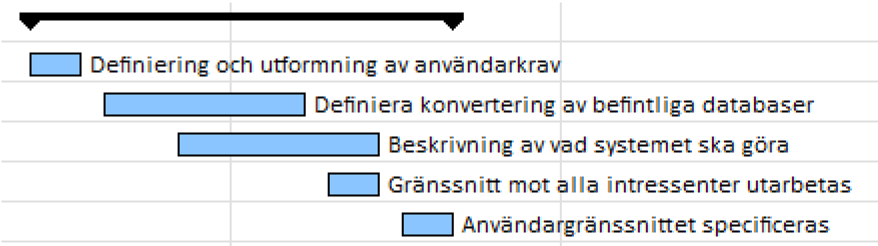
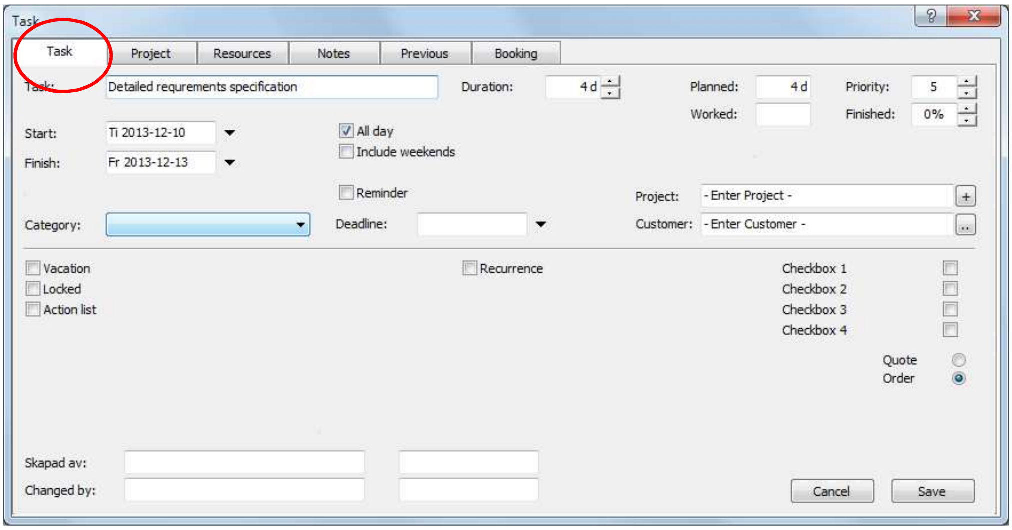


Fig. Example project



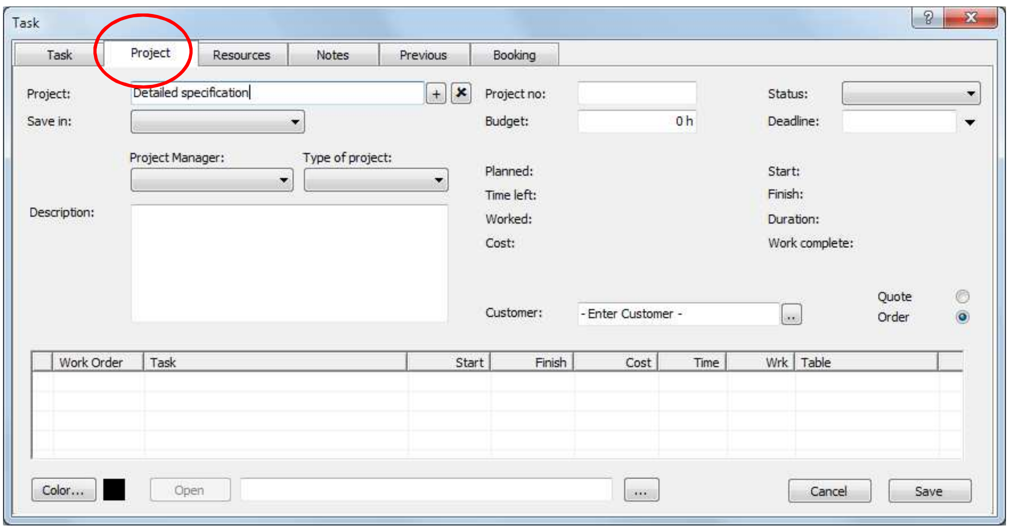


Fig. Form for new task with separate tab for project

To show/hide project details click the plus/minus to the left of the project name in the columns. Double click on the project name and you show/hide action for all projects below and including the selected project.

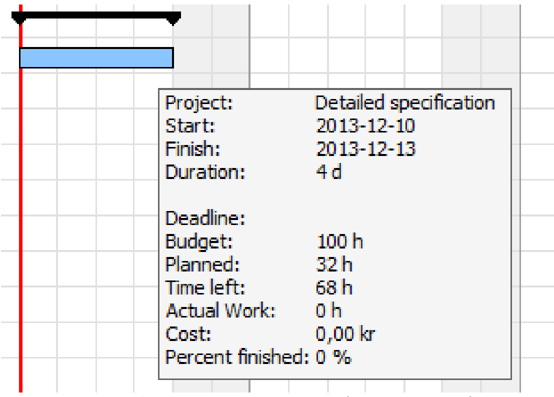


Fig. Point at the project-line and tooltip is displayed.

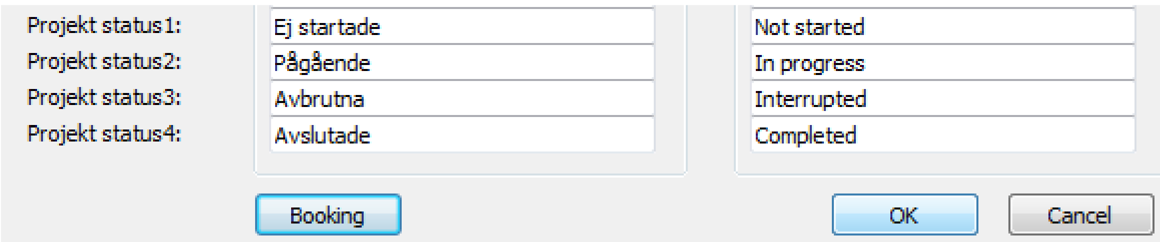
In maintenance menu, View tab, you can customize what information is displayed in tooltips. The setting apply to all users.

Project time

You can enter a projects total time in hours under the project tab. For each task added hours will be deducted from the project time and the amount of hours left is displayed under the project tab "Time left".

Project status

Project status is displayed in the project overview with four different colors, one per steps. You can rename the steps in the maintenance menu, View tab – Customized texts.



Grey – Not started
Yellow – In progress
Red – Interrupted
Green – Completed

Create a project

A new project is created via the form 'new task' and Project tab.

To create a new project

1. Click **New Task**.
2. Create the first task in the project by entering a task name and time.
3. Click on **Project** tab.
4. Enter a name for the project under **New project.** If the name is already being used by another project a new project can't be created.
5. To add a new subtask to an already existing project select a project from the list below New project.
6. Enter a name for the project. To be able to add a new project the project name should not be busy.

Optional

7. Choose a color for the project by clicking color and then selecting a color.
8. Enter a description for the project (max 255 letters).
9. Choose if the project is an order or a quote. If choosing "quote" the project will only be shown with black contours. If the project later becomes an order, change quote to order and the project will be shown with the correct colors. This enables to easely see the differences between status.
10. To exit click **Save**.

NOTE! You can save a project directly under a resource that belongs to a linked table, select a linked table under **Save in** in the Project tab.

Delete a project

You can delete a project and all tasks related to the project will be removed *).

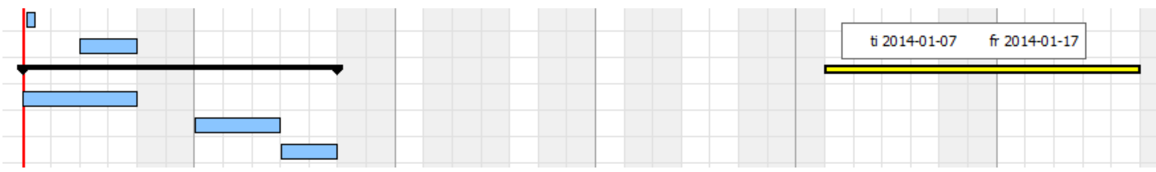
To delete a project

1. Right click on the project line or project heading in the column.
2. Select **Delete project** in the menu that appears.
3. You must confirm before the project will be deleted.

*) Deleted project can be restored in the Project Management

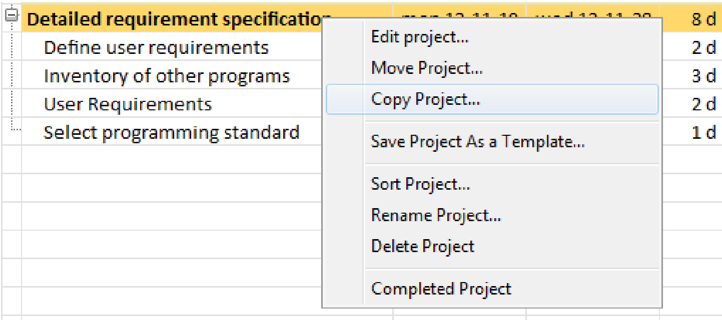
Move a project

Left click and hold on the project and use drag and drop to move the entire project. Completed tasks will not be moved.



Copy a project

You can copy a project and all subtasks. Copy to the same table or to another table*).



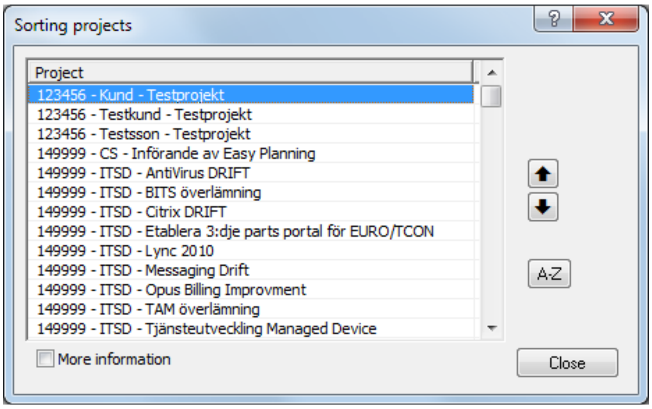
*) **Enable users to copy/move/delete projects"** must be checked in the maintenance menu.

To copy a project

1. Right click on the project line or the heading in the column.
2. Select **Copy Project** in the menu that appears.
3. Enter a new name for the project.
4. Choose a table, new start date and if the resources should be copied in the form displayed.
5. Select **OK** to create the copy.

Sort project

Projects are listed in the order that they were made. It is possible to rearrange project as shown below.



To sort a project

1. Right click on the project line.
2. Select **Sort project** in the menu that appears.
3. A list of all projects is shown. Mark desired project and use the arrows to move the project up or down in the list.
4. Projects will be displayed in chosen order.

Rename a project

You can rename a project but not have the same name on two different projects.

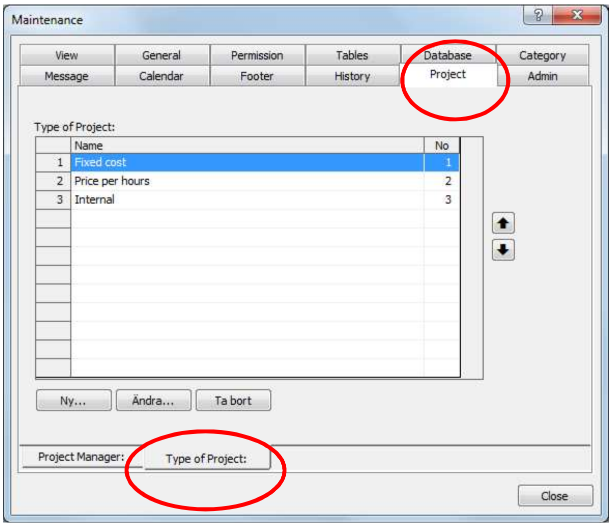
To rename a project

1. Right click on the project line or the project title.
2. Select **Rename Project** from the menu that appears.
3. Change text on the project and click OK.

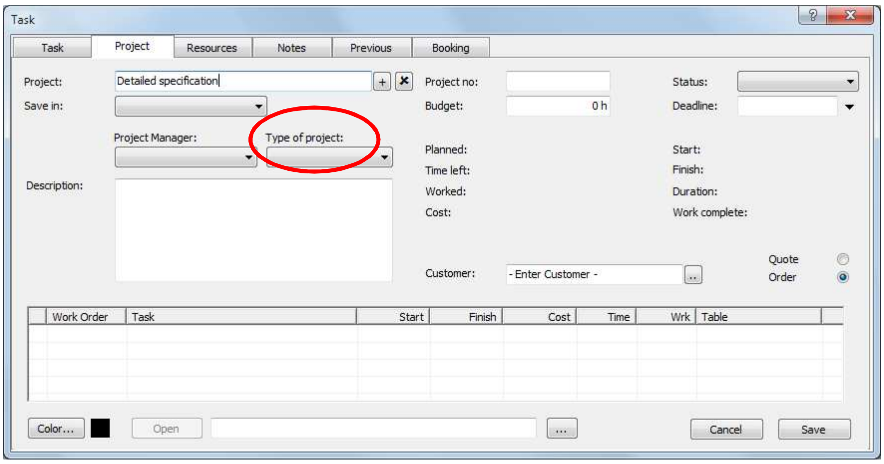
Type of project

You can create a number of 'type of project' in the same way as for categories. Then adding a new project you can select 'type of project' from this list.

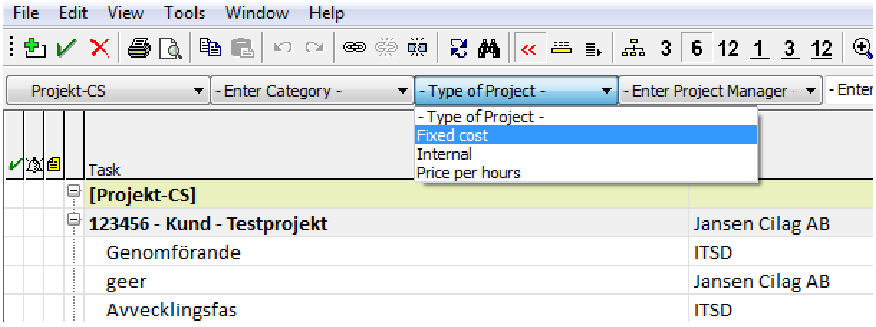
You adding 'type of project' in maintenance menu, tab project.



Then adding a new task select 'Type of project' in tab Project.



Filter by 'Type of project' in the gantt view.



Project Manager

You can create a list of project manager in the same way as for categories. When the project is created, you can select a project manager from this list.

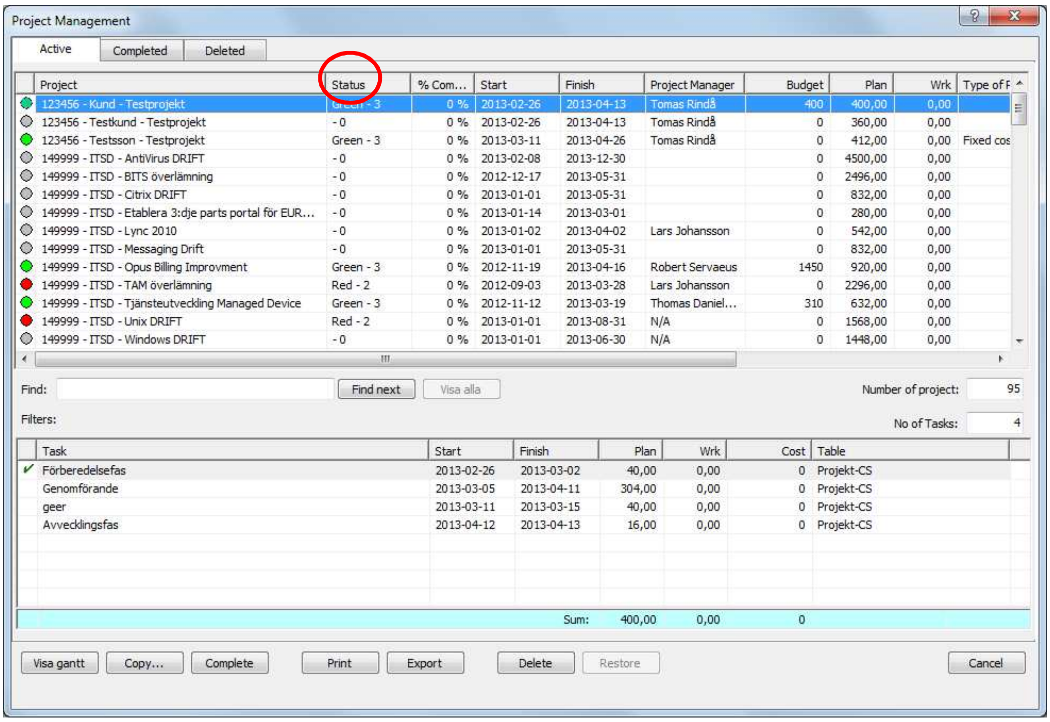
Name of project managers can be displayed as a column in the Gantt Chart and you can filter the project at the project manager.

Project Management

Project Management shows the status of all projects. You can get information about the project, budget, hours planned and worked, costs, type of project etc.

If you have deleted a project with all subtasks you can restore the project and all subtasks under the Deleted tab.

If you right click on the top list's header you can choose which columns to display. You can also reorder the columns and change column width. The changes are saved in your profile in TIDPLAN.MDB and persist the next time you select the project management.



To display information about a project

1. On the **Tools** menu, click **Project Management**.
2. Select a project in the list.
3. The list below displays all subtasks associated with the project.
4. It is possible to print a report showing time and cost for the project. Click **Print**..
5. If you want to only print one project, right-click in the first column project and select **Filter by**. Only this project will appear in the top list.
6. The button **Export** saves data associated to the project on the clipboard and can be pasted in to Excel. Copied data is separated with tab.
7. To reduce the number of projects you can filter on values in multiple columns. Right click and select filter by. Reset filtering with button **Show All.**

To filter the project list

1. On the Tools menu, click **Project Management**..
2. To view all projects with status Green highlight a row of status Green and right-click on the status column. Choose **Filter by**.
3. You can filter the columns Project Name, Status, Project, Budget, Type of project and Deadline.
4. Reset a filtered list with button Show all.

To change value in a column in project

1. On the Tools menu, click **Project Management.**
2. Select the project you want to change value on.
3. Right-click eg. status column and select **Modify**.
4. You can change value in columns Project Name, Status, Project Manager, Budget, Type of project and Deadline.

Button Show gantt
Select a project in the list and click on **Show gantt** to view this project in a filtered gantt view.

Button Copy
Select a project and click Copy to create a new copy of the project.

Delete project
Projects are not deleted from the database, they are only marked as deleted and cannot be found via **search project** . When a project is deleted it ends up under the tab **Deleted** and can be restored by using the Restore button. When restored the project is moved in to **Active** again.

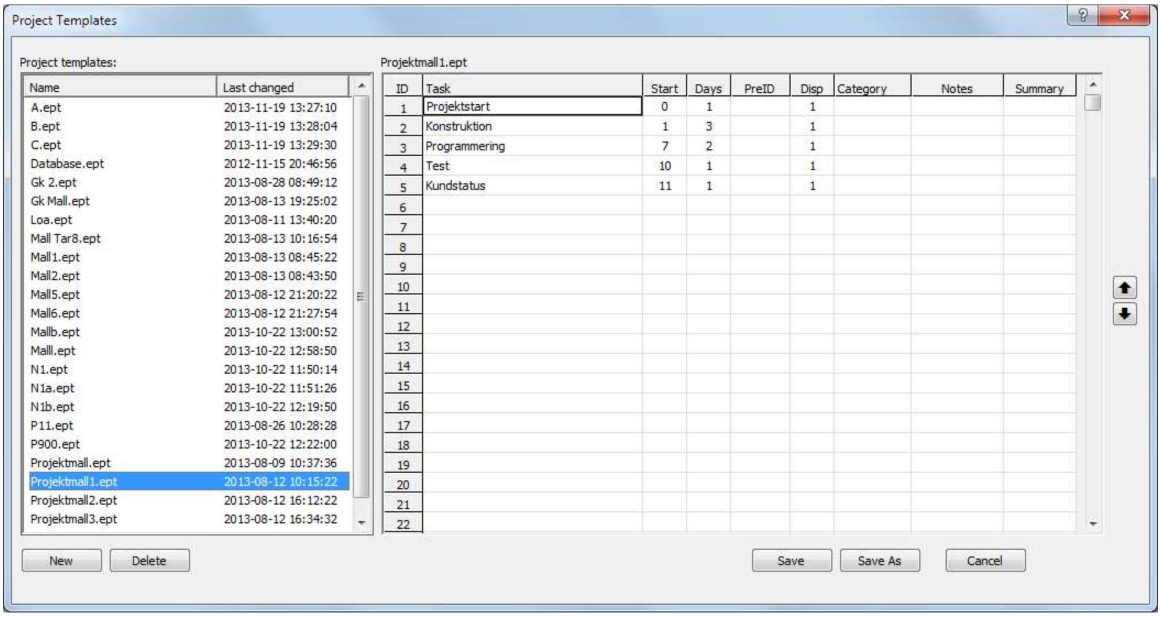
NOTE ! Permission level 4 is needed to delete, complete or restore project. It is still possible to look at, copy to clipboard and print project with a lower level of permission.

Projects can be permanently deleted from the tab **Deleted** by using the **Delete** button. When a project is deleted from the **Deleted** tab the project can no longer be restored. **Remove empty** deletes all projects that does not have any tasks associated to it. Both of these actions require permission level 5.

Project Templates

With Project templates it is possible to reuse projects. Create templates via File – Create Project Templates. Project templates can be used in any database in Easy Planning.

It is also possible to save existing projects as templates. To create a template on an already existing project mark desired project in the Gantt Chart, right click and select "Save project as a template".



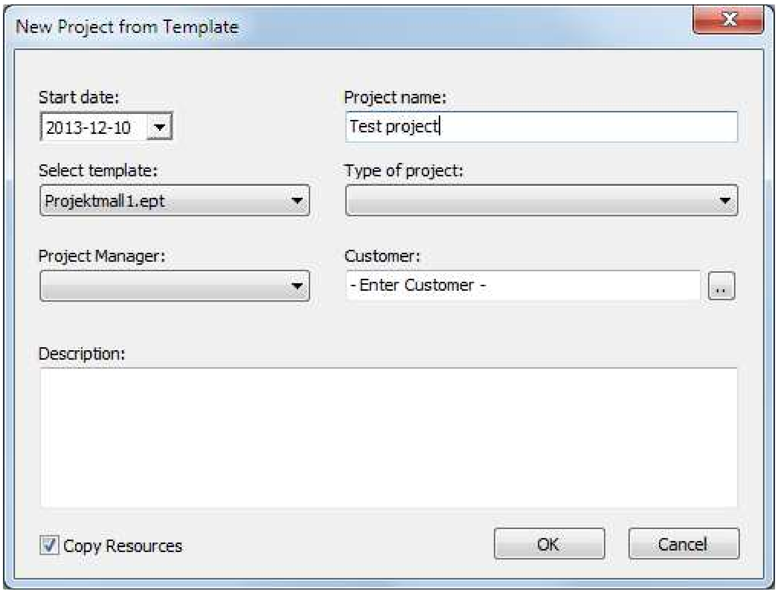
To create a project template

1. On **File** menu, click **Create Project Templates**.
2. Select **New template**.
3. Enter a taskname.
4. Enter Start as an offset, start with zero. The number used on task number two sets days from start zero. If three is entered the task will start three days after the start of the project.
5. Enter duration in days.
6. Enter PreID and task link. Under PreID enter the number of the line desired to link task to.
7. "Disp" is not used, always one.
8. Enter a note if desired.
9. Repeat if more tasks are needed.
10. When finished select **Save As**.
11. Enter a filename.
12. Close Project Templates.

A much easier way is to right-click on an existing project and save it as a project template. The template will also save resources.

Add new project from template

Right click on a blank line and select **New project from template** in the popup menu.



Enter the project start date and a new project name. Then choose a project template, project manager, type of project and ev a customer. After you click OK opens the form of the project you just created.

Summary Task

A Summary Task consists of one or more subtasks and can only be created in a project. To create a Summary Task select one or more tasks and click the Indent button (right arrow). A summary task is created with the first available WBS number at this level. WBS numbering is done individually for each project.

Summary Task will be named after the first selected Task You can easily change the name with right click and Summary Task, or by typing the new name directly in the text box that appears in the Task name as soon as you press a letter on the keyboard. The last option is only valid for users with permission 5.

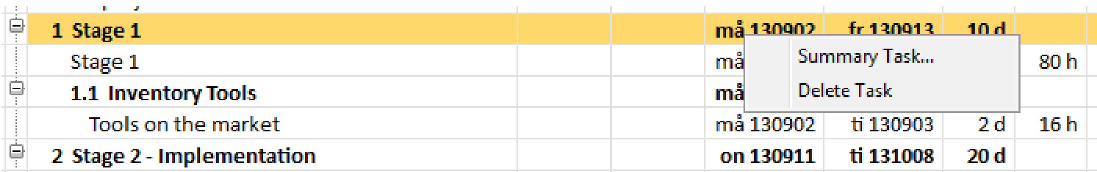


Figure. Right click and select Summary Task or Delete Task.

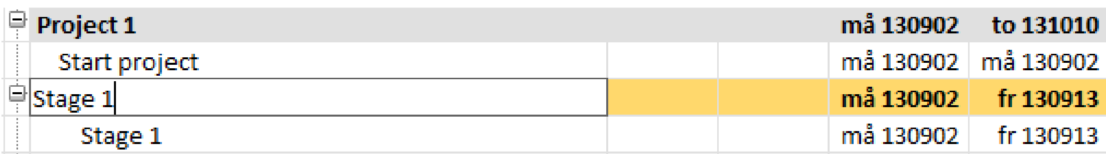


Figure. Edit Task name direct in gantt, only for users with permission 5.

Ex. The project below shows Summary Task and subtasks.

Project 1	**må 130902**	**to 131010**	**29 d**	**248 h**	**48 000,00**
Start project	må 130902	må 130902	1 d	8 h	
1 Stage 1	**må 130902**	**fr 130913**	**10 d**		**48 000,00**
Stage 1	må 130902	fr 130913	10 d	80 h	40 000,00
1.1 Inventory Tools	**må 130902**	**ti 130903**	**2 d**		**8 000,00**
Tools on the market	må 130902	ti 130903	2 d	16 h	8 000,00
2 Stage 2 - Implementation	**on 130911**	**ti 131008**	**20 d**		
Implementation	on 130911	to 130919	7 d	56 h	
2.1 Quote writing	**må 130923**	**ti 131008**	**12 d**		
Quote writing	må 130923	ti 130924	2 d	16 h	
Presentation for the customer	on 131002	to 131003	2 d	16 h	
Contract writing	må 131007	ti 131008	2 d	16 h	
3 Stage 3	**fr 131004**	**to 131010**	**5 d**		
Decommissioning stage	fr 131004	to 131010	5 d	40 h	

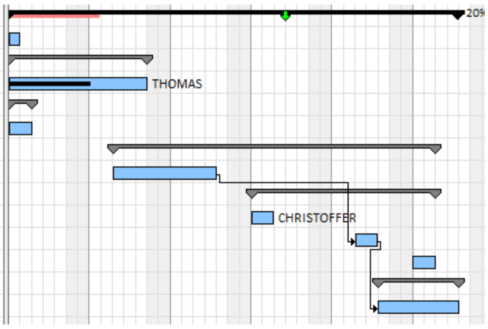


Figure. WBS structure (only for projects)

Summary Tasks numbered automatically in accordance with a WBS structure. You can create up to 9 levels with 1 - 99 steps per level.

WBS from 1 to 99.99.99.99.99.99.99.99.99

Ex) Below is an example of the WBS structure with indentation of the text. To create 2.1.1, select an task at level 2.1 and click Indent Task. To move a task to another Summary Task, simply use drag and drop.

1
  1.1
    1.1.1
2
  2.1
3
  3.1
  3.2
    3.2.1

Summary Tasks shows with WBS struktur and subtasks with text only.

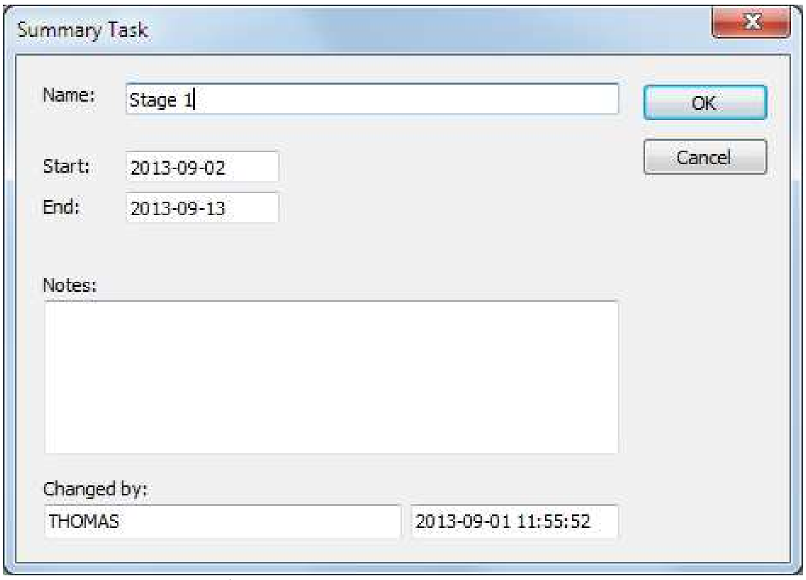


Figure. Summary Task

In form above you can change the name and enter a note. Last changed by and time/date are automatically marked when saving.

Show/hide Summary Tasks work the same way as for folders in Windows Explorer, hide WBS 1 to hide all its subgroups of Summary Task (1.1, 1.2, 1.2.1, etc.).

Working time and cost are summed per summary task and even at the top level (WBS 1 etc).

ASSIGNING RESOURCES

When you add boxes in the schedule you create resources such as people, buildings, cars, or other. To assign resources to your tasks, you need something called linked tables. A linked table works like a regular table (box in the schedule) with the difference that the Resources tab can be used. You can compare a linked table with a location or type of job (**place where something should be done**) and a regular table as a resource (**who does the job**).

By entering tasks in linked tables, you can assign one or more resources to these tasks. When you assign resources to the tasks available in the linked tables, the resources will be able to see these tasks under their own planning.

You can see what resources you have available when you make a booking if you select "Show only available" when selecting resources.

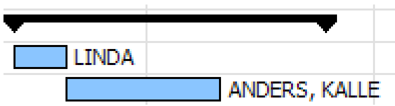


Fig. Tasks with resource name assigned

The benefits of assigning resources are:

- Tasks can be added in advance in the linked tables. You can then assign resources to these tasks, one or more persons to the same task.

- It is easy to replace a resource.

- You only need to edit or acknowledge a task in one place, even if multiple resources are assigned.

Create a linked table

In order to allocate resources, you must first create one or more linked tables.

To create a linked table

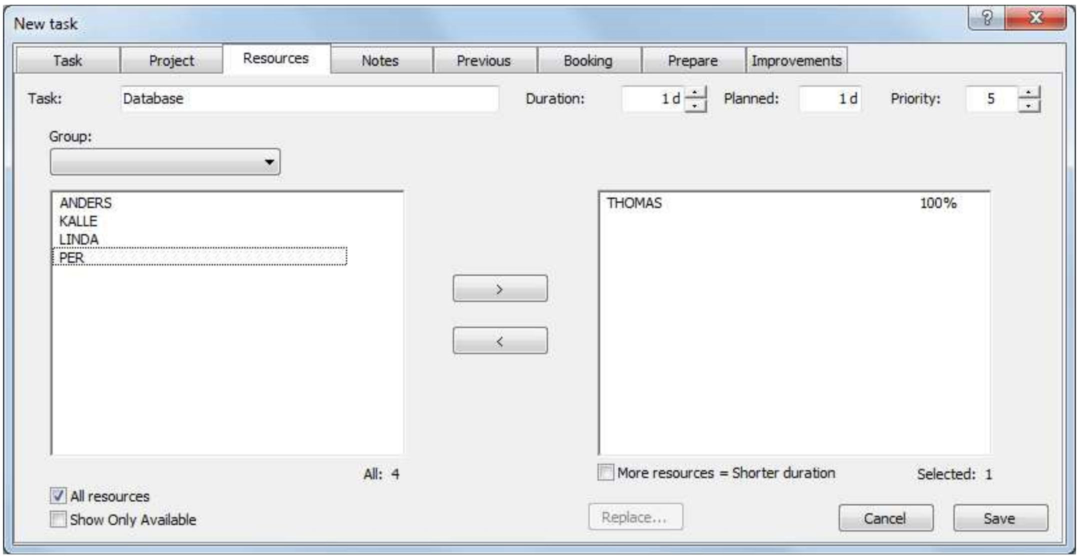
1. On the **Tools** menu, click **Maintenance**.
2. Login.
3. Select **Table** tab.
4. In the left list shows all tables created, one for each box in the current schedule. Select desire table in the left column to be used as a linked table.
5. Click the **right arrow**. The table name will appear in the right column.
6. Repeat steps 4-5 if you want to create several linked tables.
7. To exit, click **Close**.

Assign, replace or delete resources

Allocation of resources can only be made for tasks created in a linked table. For other tables are the resource names disabled and resources can't be selected.

To assign a resource

1. Enter a new task in a linked table or select Edit Task (F7).
2. Under the Resource tab, select resources by using drag-and-drop function.
3. You can also make multiple selections with the keys SHIFT or CTRL. Mark when resources in the left list first and then click the right arrow.
4. To see which resources are available at this time, select "Show only available".
5. To exit, click **Save.**



To replace a resource

1. Select the task you want to change assignment.
2. Double click on the task, or use Shortcut F7.
3. Under the resource tab, remove the required resource from the right list.
4. Then select a new resource.
5. To exit, click **Save.**

NOTE ! All resources checked = The list on the left shows all resources in the database
All resources unchecked = Only the resources that appears in the current schedule is shown

To delete a resource

Option 1

1. To remove a resource, search for this person's planning and select the task you want to unassign.
2. Double click so that Edit Task displayed.
3. Under the resources tab uncheck the required resource.
4. To exit, click **Save.**

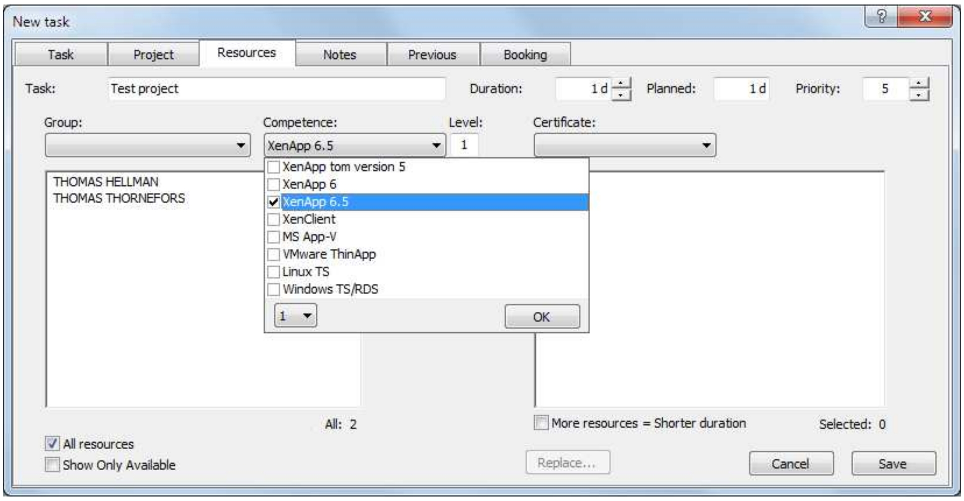
Option 2

1. To remove a resource, search for this person's planning and select the task you want to unassign.
2. Click **Delete**.
3. The assign of this resource is deleted, task remains in the linked table.

NOTE ! When you delete a resource disappears task from this person's planning, but the task is still in the linked table. So it is only the assign of resources to remove. To remove the task completely, delete the task in the linked table.

To select a resource by competence

1. First select 'View competence' found in the maintenance menu, tab View.
2. You also need to create a list of competencies and set the levels of each resource.
3. Enter a new task in a linked table or select change task (F7).
4. The tab Resources displays all resources or filtered list to a group, only available etc.
5. Click Competence and select a competence in the list.
6. Resource list now displays only those resources that meet the requirement. You can also specify a level of competence to further filter resources.



Double-booked warning

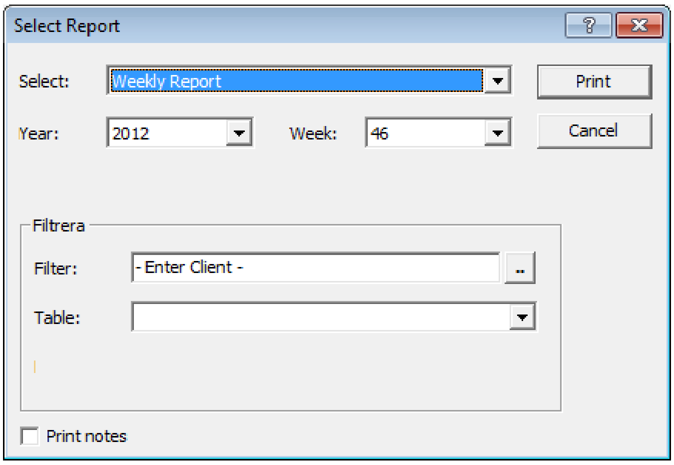
You can get warnings if a resource is double-booked. To enable this feature select menu Tools - Maintenance, View tab.

FILTERED LISTS

Filtered lists can be shown in:

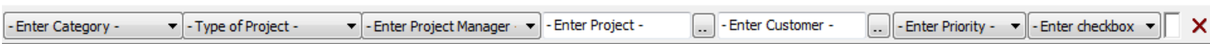
- List menus, both Gantt Chart and resource view.
- Fixed category lists, created in the schedule builder and shown in the Gantt Chart.

For all reports you can filter on customers and/or tables when printing.



Filtered lists

There are 7 filters: Category, Type of projects, Project Manager, Project, Customer, Priority and Checkboxes. When a filter is active the box to the right of the filters indicate red, and also the list menu is shown with an orange background (not shown in Windows 7 with Aero Glass). You can reset all filters with the cross to the right of the filter.

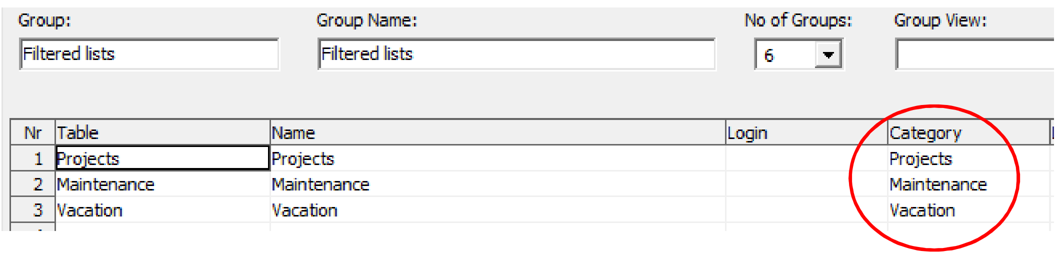


Choose Overview to search in all tables, if you filter on customers only tasks connected to this customer is shown. The filter for Project works the same way.

For Category, Type of projects, Priority and Checkboxes you can choose multiple filters.

Categories

In the schedule builder you can create boxes which are used for showing fixed filtered lists. For example project, vacation, courses or vacation. Categories must be created before they can be used.



To use filtered lists you first need to create a category list. When you add a task you choose a category. Next step is adding boxes in your schedule, which will be used to show the fixed filtered lists.

When you click a box in the schedule which is marked with category VACATION a search in all tables in the schedule will be done after every task with the category "vacation" entered.

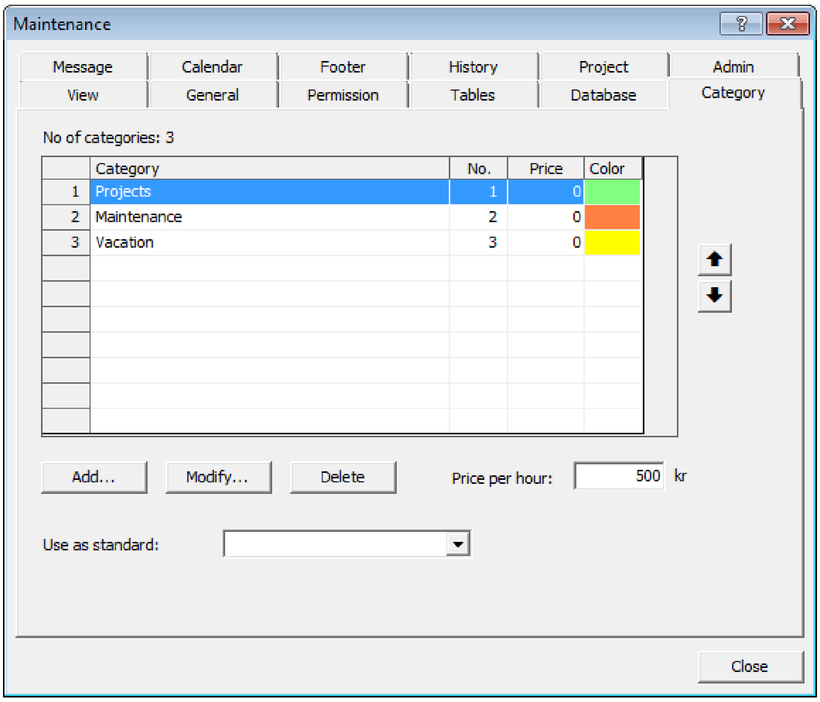


Fig. Category list

Below you can see a holiday list, this you create by selecting overview and resource view 12 weeks and filter on category vacation.

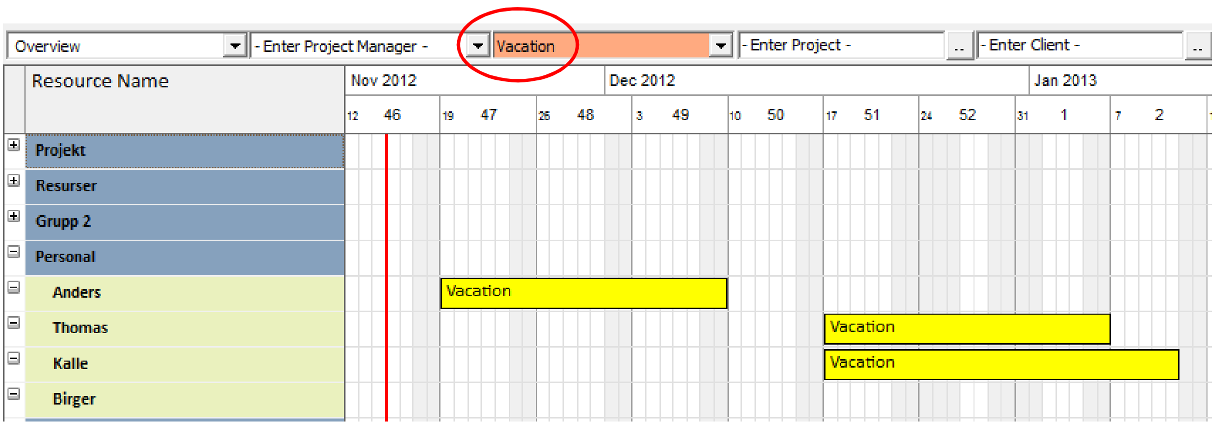


Fig. Exemple of a vacation list

You cannot add new tasks in a fixed filtered list, created from the schedule builder (from the boxes with a category assigned). However you can change and delete tasks from a filtered list.

Set as default

In the maintenance menu, Category tab you can choose a category to be used as default. All new tasks added then get this category as default.

This function can be useful if you use category to indicate different status steps for example Quote – Confirmation – Invoiced – Finished. For new tasks you get the first step selected.

Hide tasks for Viewers

If you have tasks you don't want Viewers to see you can mark 'hide for Viewers' for one or more categories. Users with permission level 1 can't see these tasks.

CUSTOMER REGISTER

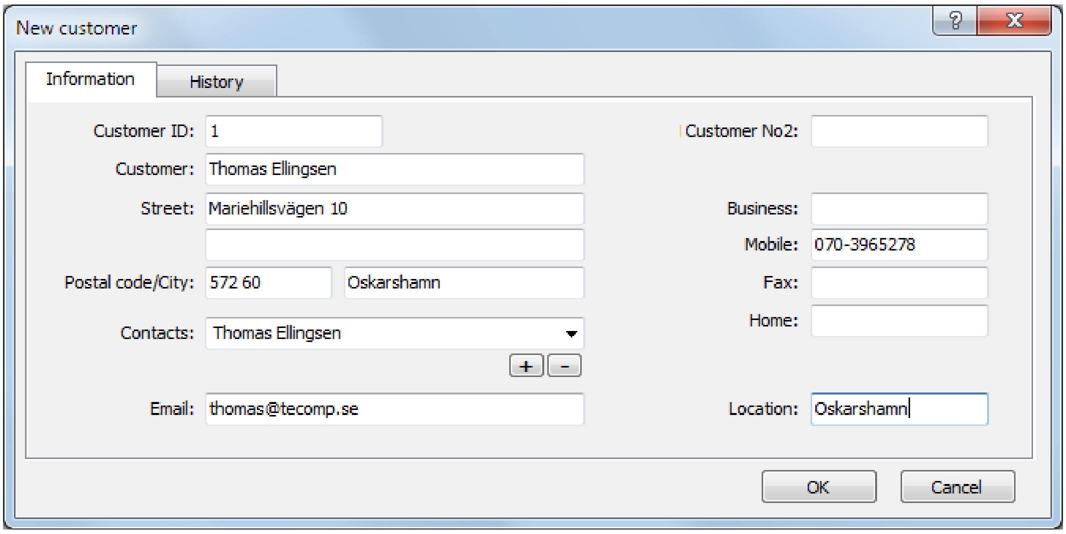
New customers are added in menu Tools – Customers or the button **Add Customer** under the Booking tab. It is possible to import an existing Customer register.

The Customer register can be used to show a filtered list on a customers booked jobs as well as to print customer reports.

Add a customer

To add a customer

1. Click **New** or key **INSERT**.
2. Enter task name and time.
3. Click on **Booking** tab.
4. Click **Add customer**.
5. Add data for the new customer and click OK.
6. You can have multiple contacts for the same customer. Add new contacts with plus and delete a contact with minus.



There are four user-defined fields that you can use to make a booking. You can change the texts to fit your business under Tools-Maintenance, View tab.

Default headlines are:

- Work Description (Info1)
- Map Description (Info2)
- Other (Info3)
- Booked by (Info4)

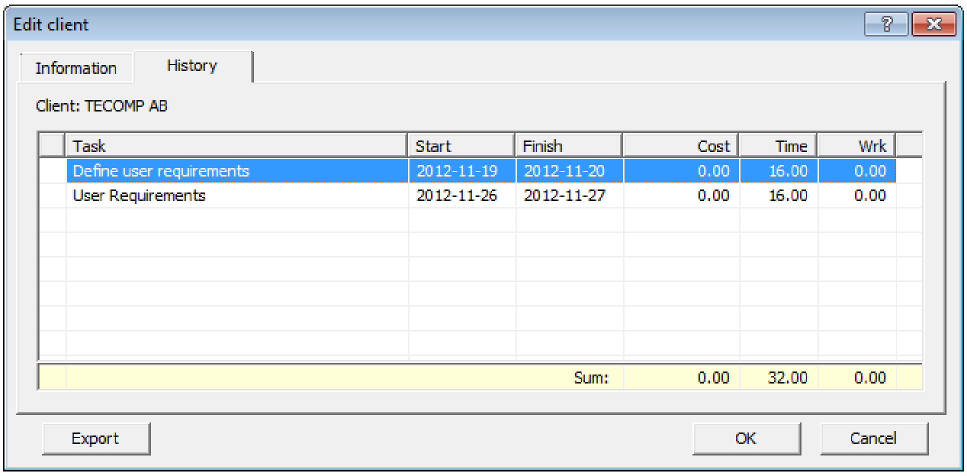
To make a booking

1. Click on **New** or key **INSERT**.
2. Enter task name and time.
3. Click on **Booking** tab.
4. Select a customer in the list.
5. Enter the booking information, four user-defined fields.
6. Click **Save**.
7. The booking can be printed as a report under the Booking tab.

History

You can view the entire history of a customer by double clicking on the customer in the customer register and select the History tab. The list collates and displays all tasks that are performed on the selected customer. Costs, planned and worked time.

With the Export button you copy information to the clipboard and can paste into Excel for further processing.



There is also a customer report in the File - Print - Reports that reports all jobs are completed to a customer. The report can filter on both the customer and resources so you can print a list of all customers a resource has had.

Add customer to a project

You can select the customer to a project instead of a task. All new tasks in the project will receive the same customer. Customer to a project are copied to tab Booking and here you can change the customer on individual tasks in the project.

Customer to a project is displayed at the project line and are visible even when the project is expanded.

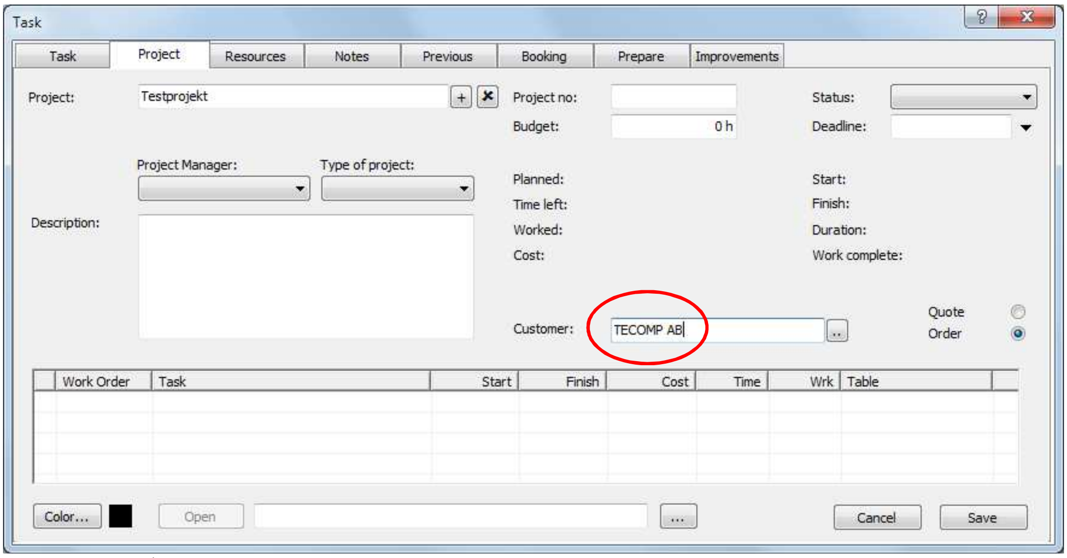


Fig. Customer by project

Add customer to a task

Customer can be selected by task or by project above. Under the tab Booking you select a customer on individual tasks. You can also choose to display the customer on the first tab, task. This choice is made in the Maintenance menu, View tab. Select the option 'Show customers'.

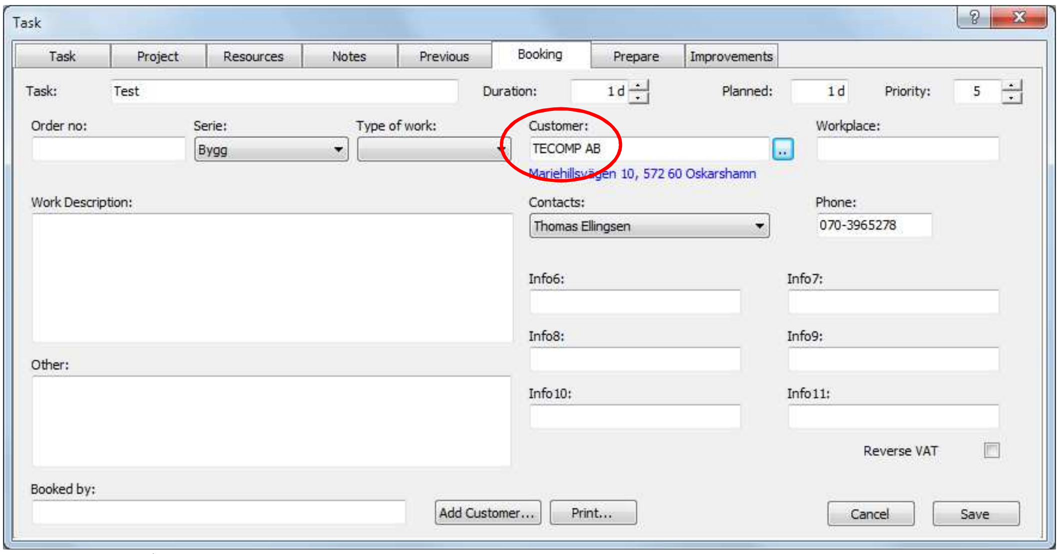


Fig. Customer by task

TIMESHEET

The program has a build in timesheet. Each user can report the time worked directly on the project and tasks in which you join.

Report the time

The form Timesheet is used to report time. This form only shows the existing tasks used in the planning, you cannot add new tasks in here.

On the **Tools** menu, click **Timesheet** or key F4. The planning view changes to Gantt Chart 1 week and the tasks which are booked that week, for the current resource, are shown in the timesheet.

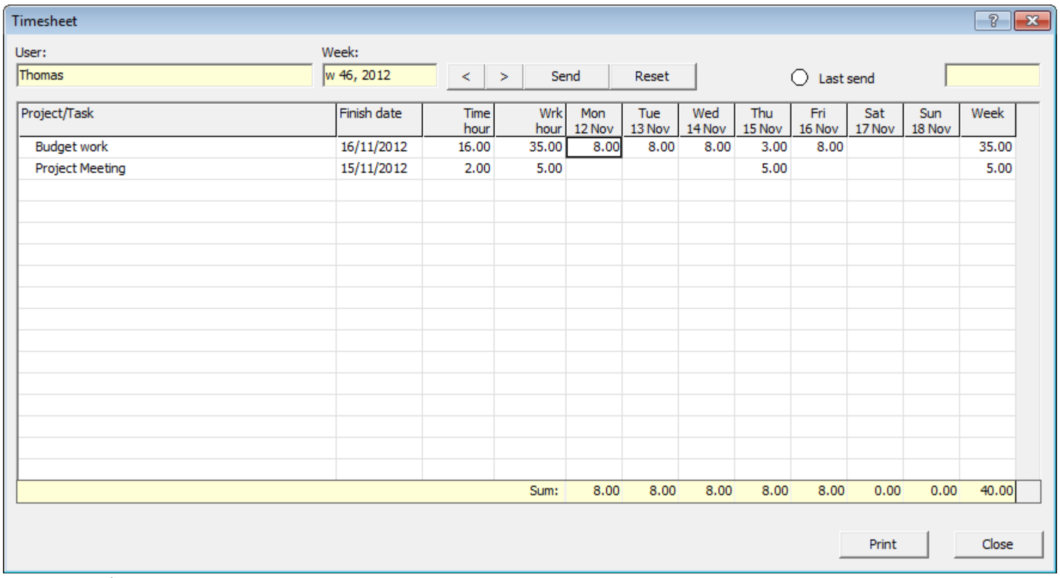


Fig. Timesheet

The time is summed per day and week. Worked time is automatically saved per task as well as per project.

Click the button **Send** when you are finished with a week, these locks that week for changes. In the top right the last send week is showed. If you need to edit a in a week which has been send you can press **Reset**. Reset can only be done for last sent week making the week you back to the last sent week.

The times you register on a task are stored under worked time. For projects the worked time is summed for the subtasks the project contains.

A follow up can then be made per project or per customer where you get the planned time, worked time and also cost per task and project.

Admin for timesheet

The administrator can create a list on users who will be admin for the timesheet. An admin can see all resources timesheets (only one timesheet at a time) while other users can only see their own timesheet.

Under **Tools – Timesheet Manager** you get a summary of the latest week sent per user.

PRINTING

Shortcut CTRL + P

Printing can be done for Gantt Chart, resource view or calendar. If you wish to print every groups planning in a list you press the button Overview in the schedule. The calendar can only print one single resource. There are also a number of reports you can print.

Ready prints are available for:

- Gantt Chart from 1 week to half a year
- Resource view from 1 day to half a year
- Calendar, week and month
- Annual calendar
- Daily schedule and weekly schedule (with signing)
- Weekly planning
- Service report 1-2 (under the booking tab)
- Reports (a number of reports available)

Print button

The buttons **Print** used the period which is showing on the screen when printing.

Print button

Preview

To be able to preview a PDF printer is required. You can choose which PDF printer that should be used under the menu **Tools – Maintenance, General tab.**

We recommend that you install **PDF Creator**. The advantage of this program is that the program auto-save and auto-open automatically. The program is freeware and can be downloaded from our website or at http://www.pdfforge.org/pdfcreator.

Settings for PDF Creator:

- **Under Auto-Save** mark Use Auto-Save. Enter <Title> under filename and <Myfiles> as your saving catalogue.

- **Under Action** mark Action after saving. Choose Adobe reader as reader and start maximized.

Printing Gantt Chart

If you want to print Gantt Chart for one resource only you choose this resource from the schedule and then print.

When you choose a group from the schedule all resources under this group is showed. A print is normally done for all resources. If you do not want to print all resources in the group you press the minus to the left of the resource you wish to not print. The symbol is changed to a plus and no print is done.

You can also switch between showing/hiding by double clicking on the resource or press the keys +/-. If you wish to switch quickly between showing/hiding all resources at once you press the buttons show/hide resources or double click on the top resource.

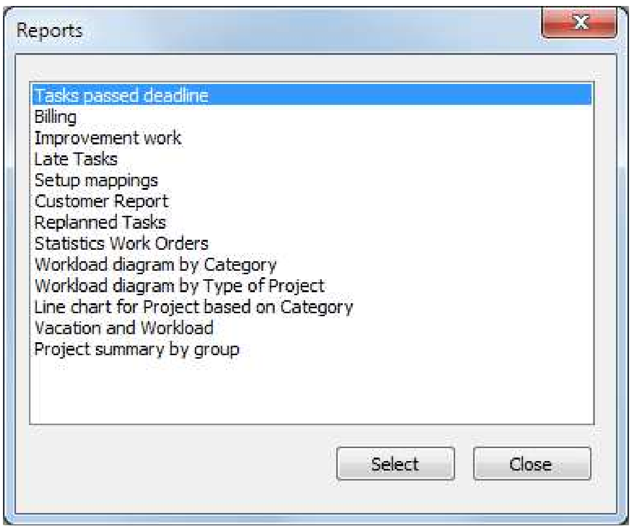
The hidden resources and groups (+) will not be printed in the Gantt Chart.

Fig. Group view . The plus hide tasks.

NOTE! Current status to show/hide resources that you controlled with +/- is stored in the database TIDPLAN.MDB per user.

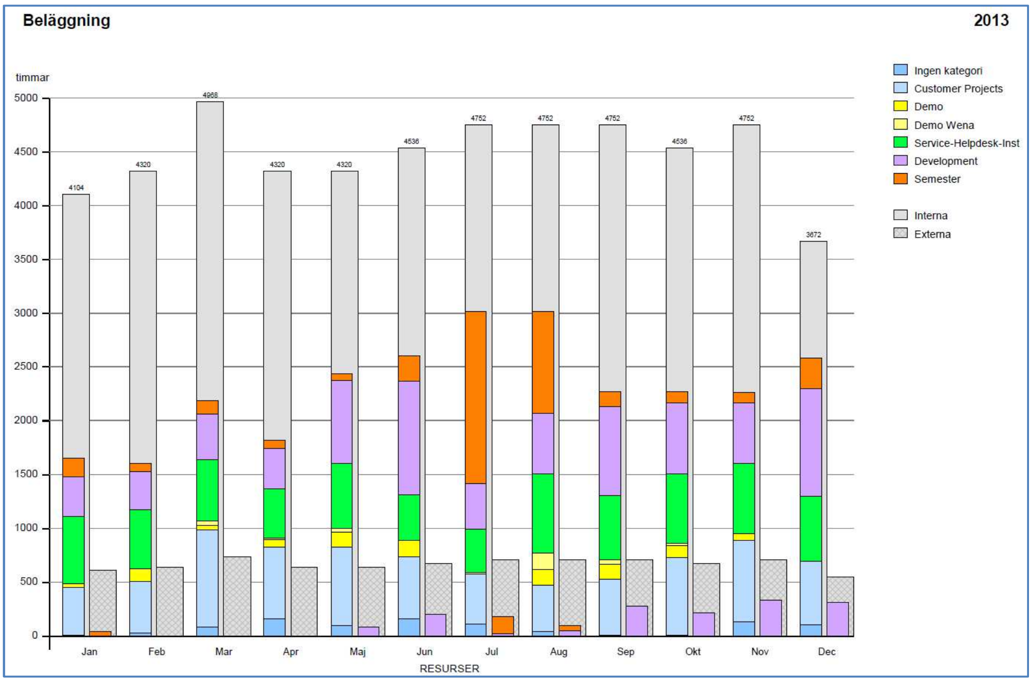
Print reports

All reports are collected in menu File – Reports. For many of the reports, a filtering by customer and/or resource can be done. The time period can be weekly report, monthly report or any period of your choice, for example 1 year.



Workload diagram

There are two reports summarizing the workload, one per category and one per project type. Summation is done per group with one or more groups, or you can select the entire schedules workload in one diagram (sum groups).



Service report / Booking report

Under Booking tab in form New Task there is a report you can print. This report can be customized to fit also for printing bookings.

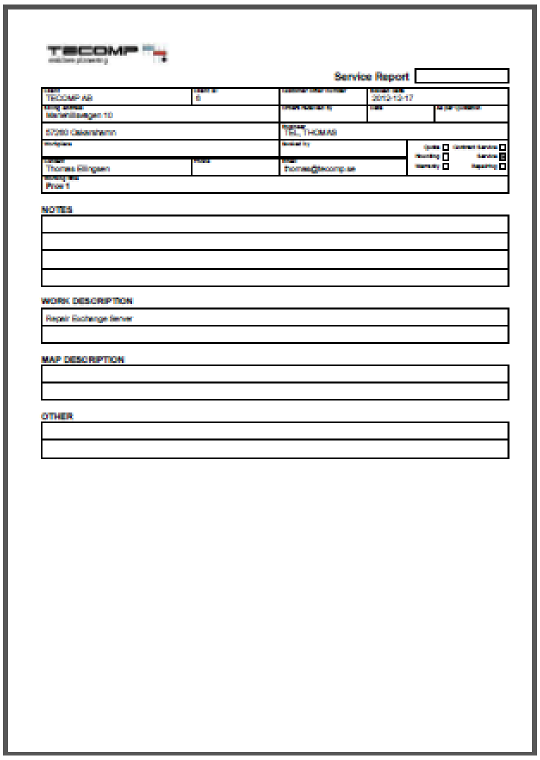


Fig. Service Report

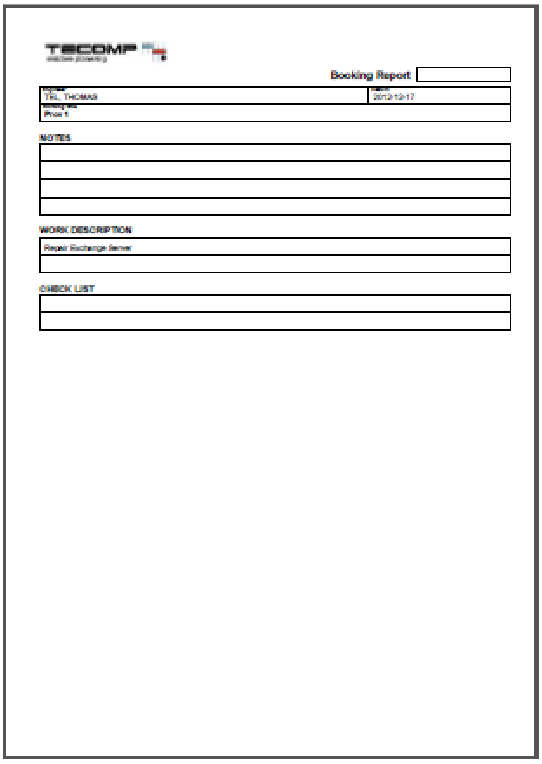
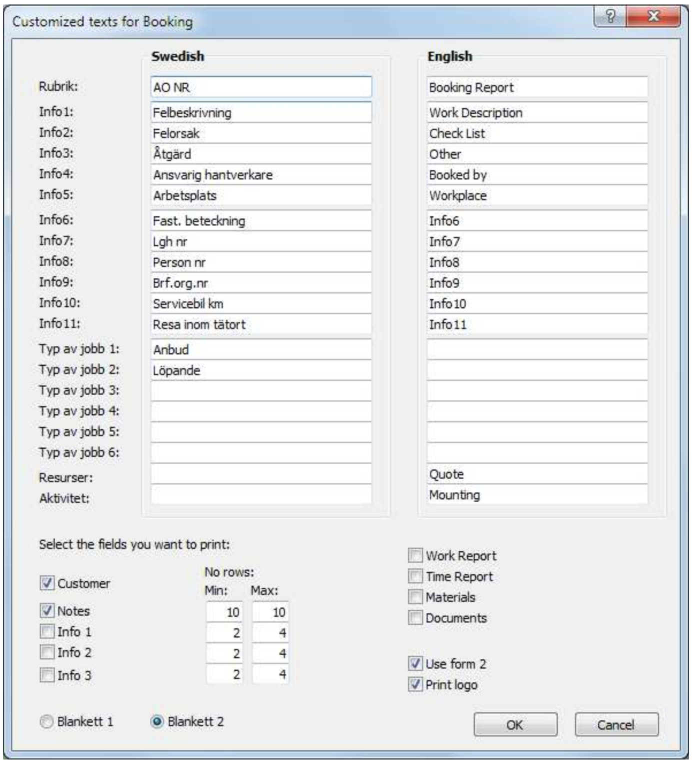


Fig. Booking Report

Settings
On the **Tools** menu, click **Maintenance** and View tab. Then click on **Customized texts** and further button Booking.



There are two forms, choose between Form 1 or 2. Form 2 is more suited for builder.

Under settings you can customize the layout and title of the report. You can enter any report name. Info 1-5 can be found on the Booking tab on form New Task. Type of work 1-6, "Typ av jobb 1-6" are the check boxes on the report. Resources and task are titles in the report. The check boxes specify which fields are going to be printed. Same for Customer and Logo.

You can specify how many lines you want to show for the field notes and fields info 1-3. You enter the minimum and maximum number of lines per field. Minimum 4 and maximum 10 means that at least 4 lines is printed and no more than 10 lines (less if the text do not need 10 lines). Minimum is 1 line and maximum is 100 lines.

To print the service report or booking report you double click on a task and click on the Booking tab and the print button.

Create custom reports

You can create your own customized reports in Access 2000. To create a report you need Microsoft Access installed and also have exclusive right to the database, which means you are the only one online on the database when you create the reports.

When you create a new report in Access you enter source data, can be an existing table or a question you have created. You can copy reports and questions from other databases and paste into your own database. The list of reports includes reports created in the database TIDPLAN.MDB.

Customized reports can be printed or showed on the screen from Easy Planning. You find them under View – Custom Reports.

Shortcut **F6**

Database seaching

Searches in database tables can be done with up to 25 search conditions. You get to the search window by pressing the button **Database** in the toolbar.

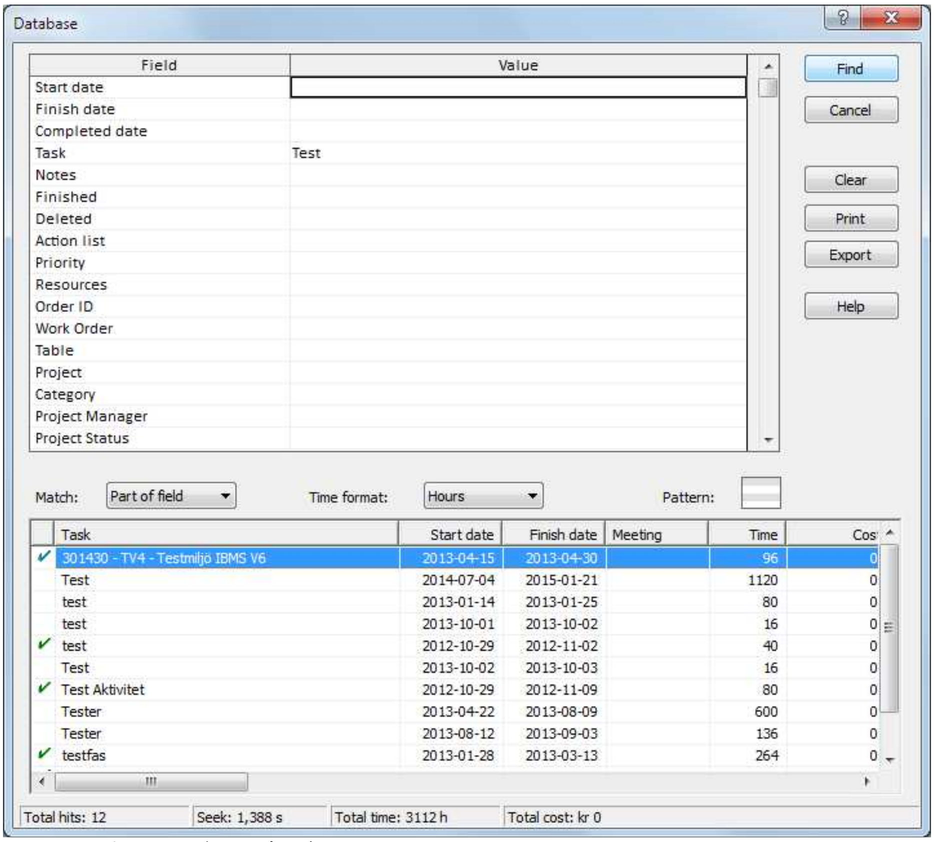


Fig. Form for searching databases

Searching is made in all tables in the database. However, you can limit your search to one table by choosing table as your search conditions.

The search result can be printed as a report or copied to clipboard. You can sort the result before you print if you click on any title in the lower list.

Double-click on a task in the lower list to show the edit task.
Right-click on a task to highlight this task in the gantt view.

Start date, finish date

- If you enter start date only, searching is done from this date and forward.
- If you enter finish date only, searching is done for earlier and to this date.
- If both start and finish date is enter, searching is done between this dates.

Completed date

Search for tasks completed this date or earlier.

Task name
Free text search. Search for 'text' in all tasks. Choose between "part of field" (program add % before and after) or "whole field". Multiple choices can be done with a semicolon.

Format:
[TEXT1 ; TEXT2 ; TEXT3]

Notes
Search for tasks that contains this text in notes.

Finished
Search for finished or active task.

Format:
[YES , Y , 1] = completed task
[NO , N , 0] = active task

Deleted
Search for deleted task.

Format:
[YES , Y , 1] = deleted task
[NO , N , 0] = not deleted task

Action list
Search for task with action list marked.

Format:
[YES , Y , 1] = action list
[NO , N , 0] = no action list

Priority
Search for tasks with a given priority. Multiple selections can be separated by semicolon.

Format:
[priority1 ; priority2]

Resources
Search for tasks with given resource name. Multiple selections can be separated by semicolon.

Format:
[resource1 ; resource2]

Order ID
Free text search for order numbers, search in all tasks.

Work Order
Free text search for work order, search in all tasks.

Table
Search in a marked table only. If not specified, the search is performed in all tabled in the database.

Project
Search for tasks with the project chosen from the list.

Category
Search for tasks with the category chosen from the list.

Project manager
Search for tasks with this project manager.

Project status
Search for tasks with this status.

Type of project
Search for projects with selected type.

Customer
Search for tasks booked on this customer.

Checkbox 1 - 4
Search for tasks with this field marked. Checkbox 1 – 4 can be replaced with any name in the maintenance menu, tab view, customized texts.

Changed by
Search for tasks last changed by this user name.

Last changed
Search for tasks changed after this date/time.

Format:
[Date] or [Date Time]

eg 2013-03-25 12:00 all tasks changed after this date

Shortcut CTRL + B

Find tasks

Search tasks via menu **Edit – Find**. A search window appears where you can enter all or parts of a text.

Search is done in the following fields:

- Task name
- Work order
- Order ID
- Project
- Project No

If you get a hit the task been highlight if the table is in the current schedule.

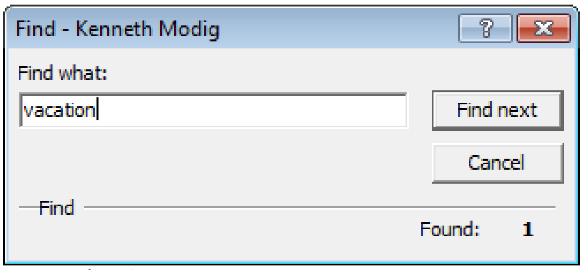
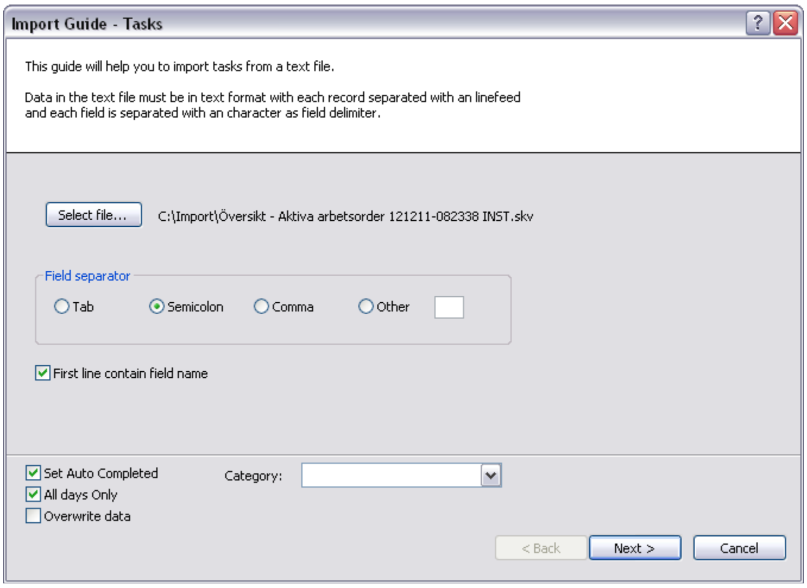


Fig. Find tasks

Import tasks

You can import tasks from external system via text files. The import is done according to the import guide below where you choose file, field separator and then mapping columns in the text file to fields in the database. You can save a mapping in order to be reused again.



Functions

- You can map a field to <Table> and controlling imports to different tables.
- A text converter translates the column names in the text file to the table name in EP.
- Is not the table name being mapped is found the task is stored in default table instead. Select default table in settings for import.
- Work order number from the maintenance system is mapped to <Work Order> in EP, gives no duplicates.
- When a work order is history in the external system, these been auto acknowledge/deleted in EP.
- Import can be made to a category.
- Timestamps new tasks on import (only for work orders).

Overwrite data

Only the fields that have been mapped will be overwritten when you select 'Overwrite Data'.

Note! The exception is if you made a replanning in EP under the tab prepare, then will not the old start and end dates be overwritten during import.

Work orders

You can import working orders from an maintenance system to EP and moving the working orders to different tables and then resource planning the tasks. When the working orders are done in the maintenance system they can be completed automatically in EP. Auto completed can only be done on tasks with a work order number.

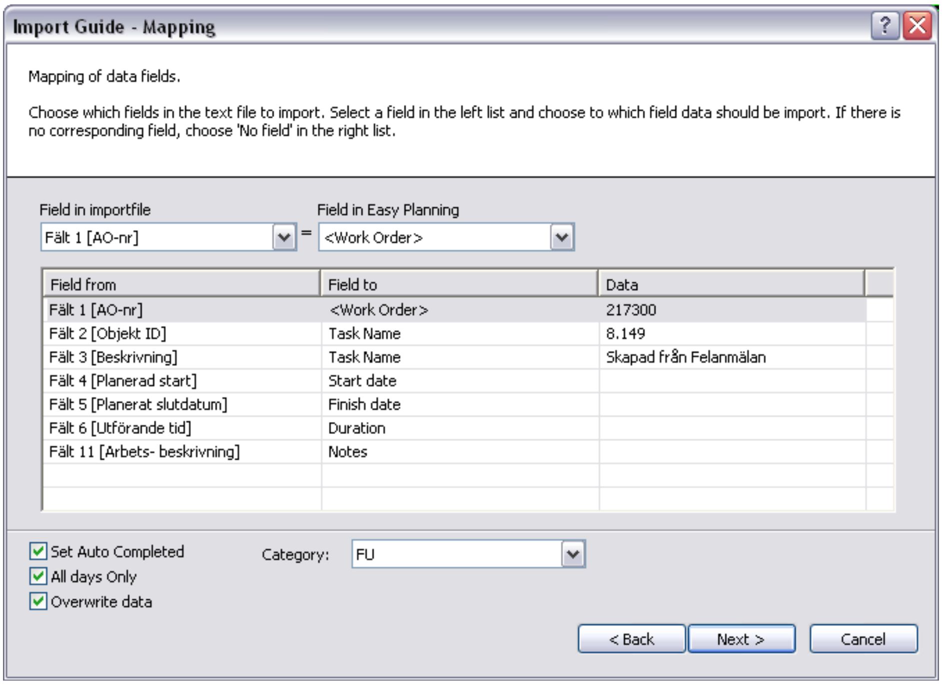
In Gantt Chart you can mark a working order, right click and choose 'Copy work order to clipboard' (CTRL+C), the work order will be copied to the clipboard and the number can be paste to you maintenance system.

Timestamps of new work orders on imports. This date is then used in the report '**Statistics work orders**' to report the number of new work orders per day Mon-Fri.

Mapping

The mapping is done as you select a field in the left list and choose to which field in EP data is imported. Repeat for all fields you want to import.

The list below shows the fields that have been mapped and the data for the first line of the import file, second line if there is a header. You save the mapping in the next step so you do not need to remap again the next time you import data.



Text Converter

The text converts function is to remap the table name into the correct table. If you have mapping a column to <Table> in Easy Planning, the text converter can "translate" a name in the import file to a table name by the converter.

The text convert can also be used in the same way for resource name.

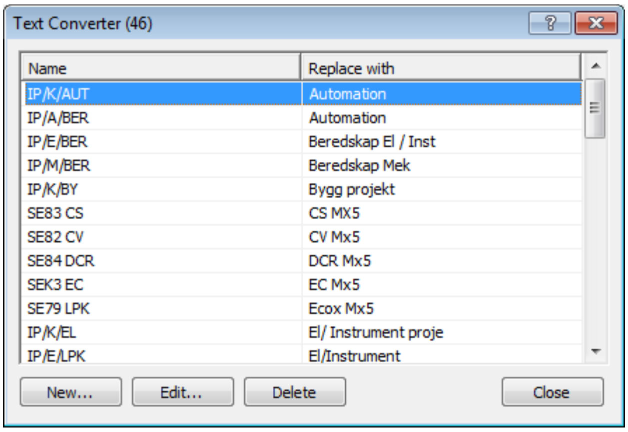


Fig. Table name IP/K/AUT from the text file is translated to table Automation

If you import work orders, and have mapping a field to <Table> you can control work orders directly to various tables in the database. The control is done in the following order.

- Step 1, same name. Is there a table in the database with the same name as the import file task is stored in this table.

- Step 2, use text converter. If there are no table with the same name a check is made against the text converter. If you for example set title IP/A/AUT (see Figure above) returned table Automation.

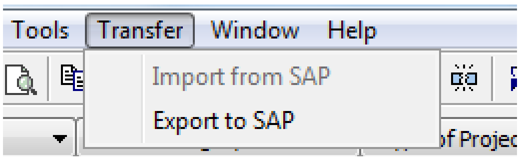
- Step 3, table name is missing. If the table name does not exist in the database or in text converter will data be stored in the default table. You select a default table under settings.

The text converter can be found under the Tools Maintenance, View tab. You can add, change and delete names from the list.

Are you trying to give a name twice in the left list you get an error message. You can enter several different names in the left part that points to the same name (table) in the right part.

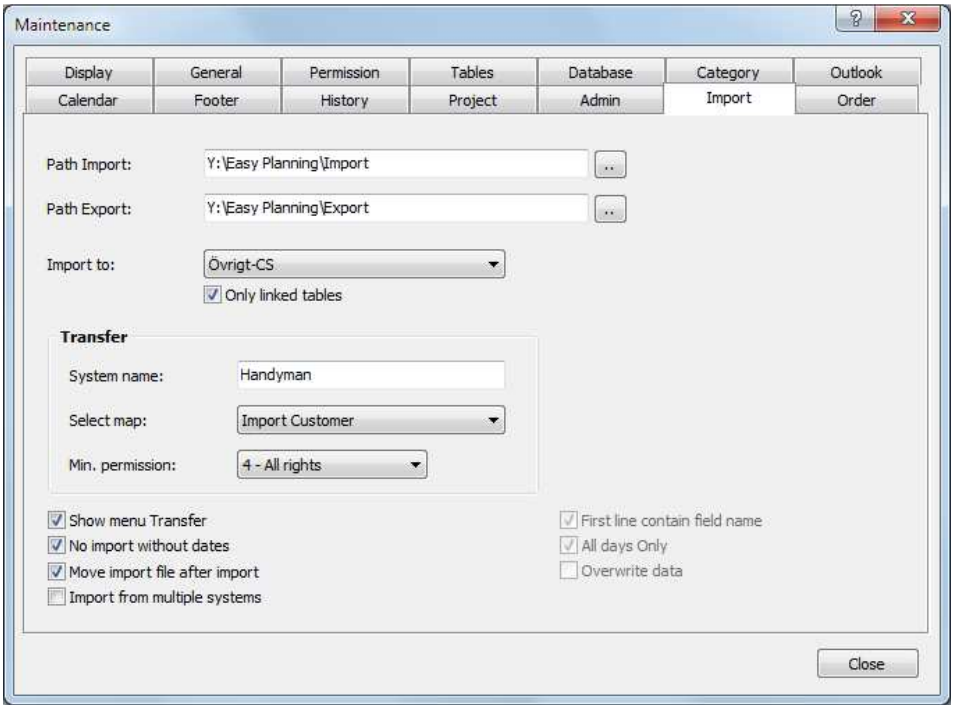
Integration with other system

By the Transfer menu, you can easily retrieve data or send data to another system. To view the menu, select the settings for import. By specifying a minimum permission, you can limit who is able to use this function.



When you click on the menu option 'Download from <system>' EP will start an import of the import file in the folder Import. Are there multiple files, they will be automatically imported one file at a time. Before you can use to transfer, you must run the import wizard once to learn the system.

Settings for import are in Tools - Maintenance, Import tab.



Select an import and an export directory. Default specifies a subdirectory of the data files.

Import to, specifies the default table at which the import should be done if mapping to <Table> are not used.

System Name, enter the name of the system integration. Appears in the menu 'Transfer'.

Mapping file, specify the name of the mapping to be used for transfer.

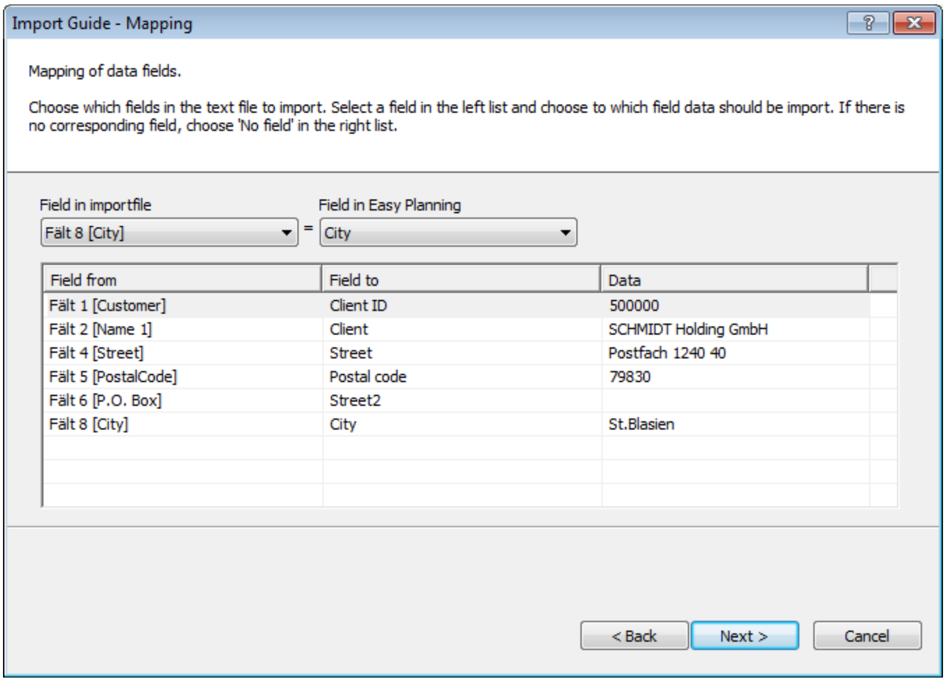
Minimum permission limits the number of users for the transfer function. Viewers can not use 'transfer'.

Select 'View menu transfer' to view this menu. If you select 'Move import file after import' then the import file will be moved to the directory backup after an import. Otherwise the import file will be deleted.

Import customer register

You can import your existing customers register to Easy Planning. Press 'Choose file' and mark the text file that contains your customer register. Select field separator and press Next.

Choose field 1 in the left list and mapping the field against the right list. Repeat for all field in the left list. If there is a field you do not want to import you choose 'No field' in the right list. Finally press Next.



Import data from Clipboard

Data can be imported to Easy Planning using Excel and clipboard.

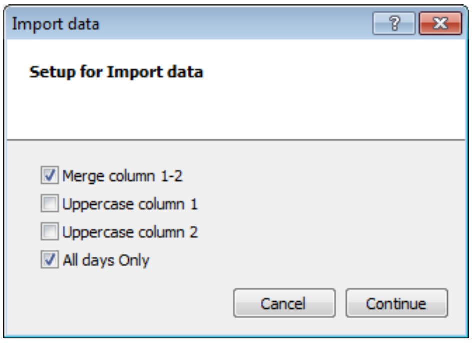
To import data from Excel

1. In Excel you create the following columns where you enter (Any text), Task, Time, Start date, End date, (Project), (Table) and (Category) in this order. Only one of the columns end date/time needs to be completed. Table name should be a table in the database where data is imported. You can specify different table names for different rows in Excel. If you omit table name it is imported to the marked table.

2. In Excel: Block select from the first row, first column to the last row and last column. Press copy and switch to Easy Planning.

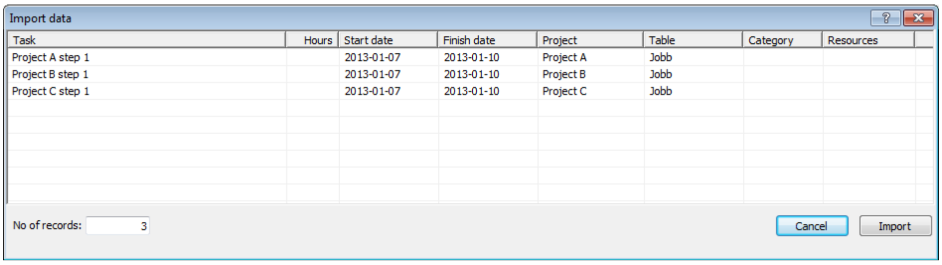
3. In Easy Planning: Choose **File – Import - Import data from clipboard** when you are in the Gantt Chart.

4. The following dialog appears. Mark 'Merge column 1-2' if imported data for task name is divided into two columns, for example. Anl.ID and Description.



5. Click Next.

6. The following list appears. Click **Import** to apply.



Export data

You can export all new and modified tasks from all tables into a tab-delimited file, EXPORT_yyyymmddhhmm.TXT saves in the export directory, see Settings Import.

To export data

1. On the File menu, click Export.
2. Select 'Only changed since the last export' or 'All Tasks'.
3. Alternatively, click on Transfer - Sending data to the system.

Each task has a field Export that will be set to 1 on export. If you change a task or add a new task the flag will be set to 0 again. This means that only the changed tasks in EP will be exported.

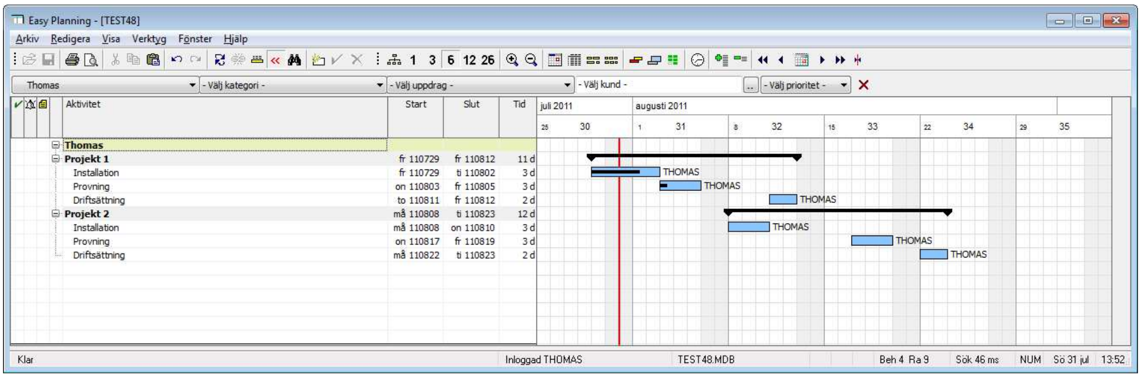
The export file contains the following fields:

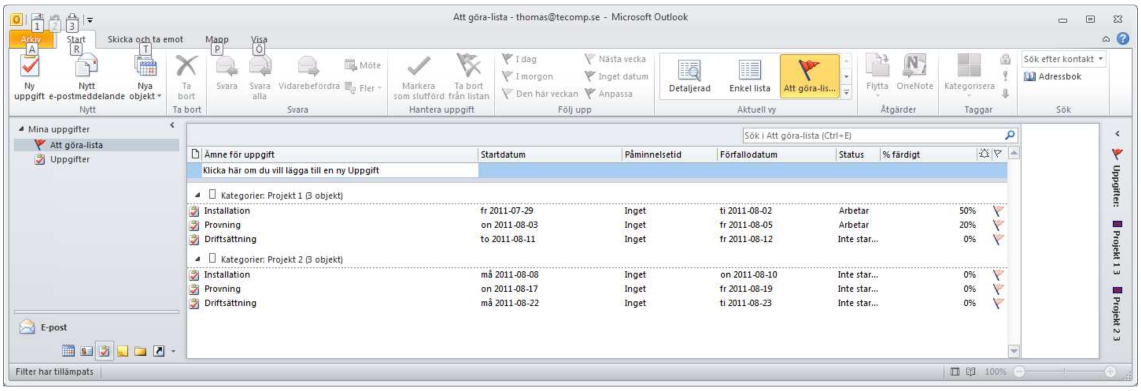
ID	Serial number in the text file
Workorder	Workorder
Table	Table name
Project	Project name
Task_Name	Task name
Start	Start date
Finish	End date
Duration	Duration in hours
Planned	Planned time in hours
Percent	Percent completed
Resources	Resources name separated by semicolon (=20 means 20%)
Category	Category number
Priority	Priority 1-9
Customer	Customer name
Customer ID	Customer ID
Actual_Work	Actual work in hours
Cost	Cost
Deadline	Deadline
WBS	WBS
Outline_Level	Outline level
Milestone	Milestone 1/0
Last_Changed	Last Changed (yyyy-mm-dd hh:mm:ss)
Notes	Notes
Deleted	Deleted 1/0
Order	Order number

SYNC WITH OUTLOOK

Easy Planning can sync with Outlooks Calendar, the sync can be started manually or time controlled provided that Easy Planning is running. There is also an add-on program Sync Master that can sync many calendars automatically.

The result of syncing tasks is showed below. Each project is transferred to Outlook as a category with underlying tasks.





For tasks the following fields are synced:

Subject	Task name
Categories	Project name
Startdate	Start date
Duedate	End date
Body	Notes
ReminderSet	Reminder
ReminderMinutesBeforeStart	Reminder time
Sensitivity	Private
PercentComplete	% completed
Complete	Completed

Start synchronize

Press the button **Sync** on the toolbar, then the following form will appear. Users who are not Admin can only sync their own calendar in Outlook.

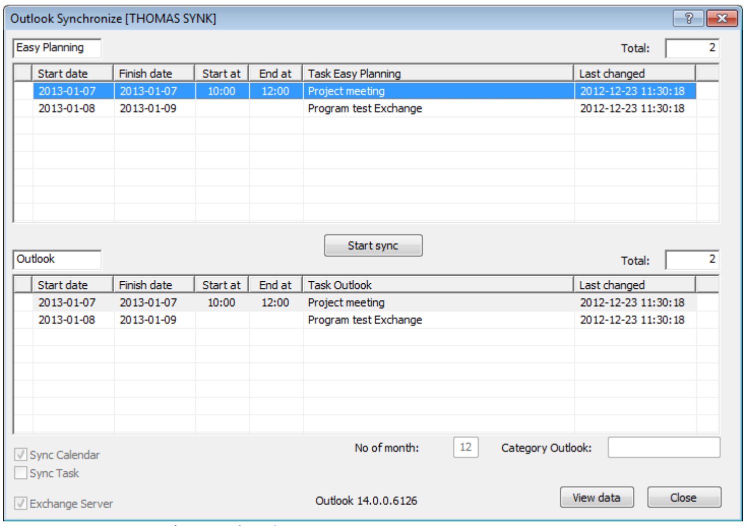


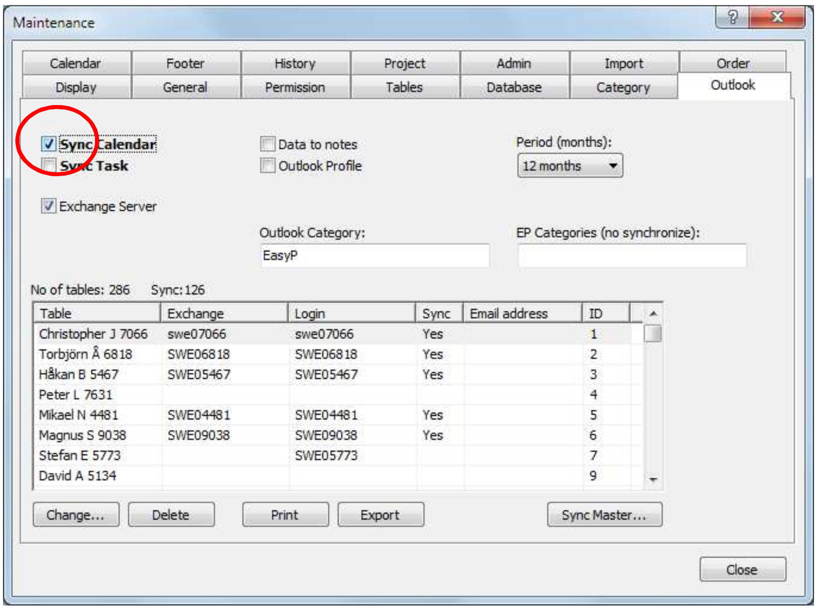
Fig. Syncing with Outlook.

Settings for Outlook

Before you can start syncing, Admin needs to do following settings:

- Choose what shall be synced, calendar and/or tasks.
- Remap table against user name (column Login).
- If Exchange is used, enter Exchange account for each calendar.

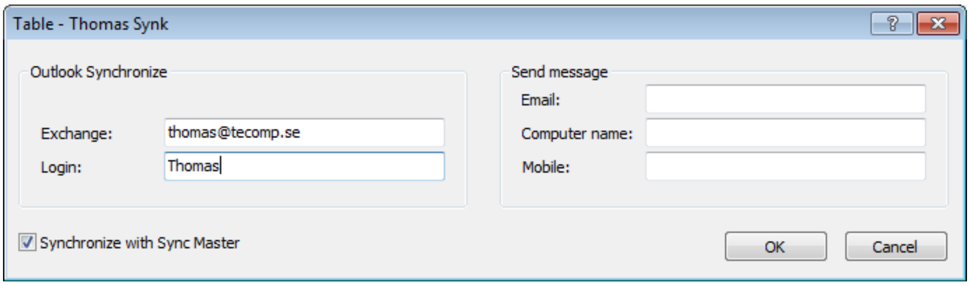
Under Tools – Maintenance, Message tab you choose calendar and/or tasks. You also check Exchange Server if Exchange is going to be used.



Settings for Exchange

You can choose to sync with Exchange or with your local PST file (Exchange uses your calendar on the server and PST your local calendar file).

If the Exchange server shall be used (normally) you need to enter an Exchange account on the Exchange server for each users table. The account can be your E-mail, surname.lastname or any other name. Contact your computer support for help.



You mark one resource (table) at a time and click Change.

- In the column **Exchange** you enter users E-mail account on the Exchange server.
- In the column **Login** you enter user name in the network.

Admin for Exchange

If you should have Admin rights to sync other users calendars, users must share their calendars to you (this is done in Outlook). You can as Admin select any table in the overview diagram and sync this calendar for one resource at a time.

You add Admin users in the maintenance menu, tab Admin.

Outlook Category

Enter any name here and no appointments created in Outlook will be synced, only from Easy Planning to Outlook. The category name you enter is marked as a category in outlook and you will see the EP tasks in Outlook with for example a yellow color against Outlooks blue color. Note that you can create a task in Outlook and select the category name here and then it will be synced.

This category is not used for tasks, means all tasks will be synced. The field category in Outlook is used for project names from EP.

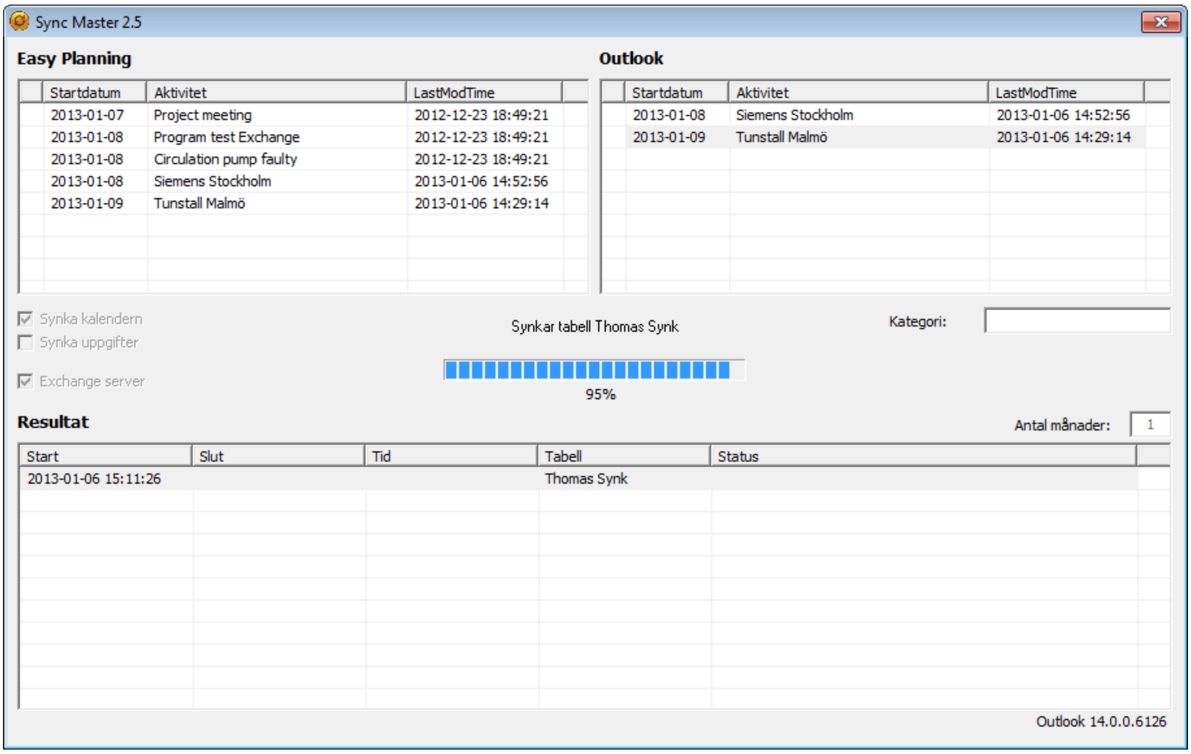
EP Categories

If you have categories you do not want to sync with Outlook you enter these categories here. If there are several names they shall be separated with semicolon.

Take for example that you have service that you do not want to sync to Outlook, select the category Service then these tasks will not be synchronized.

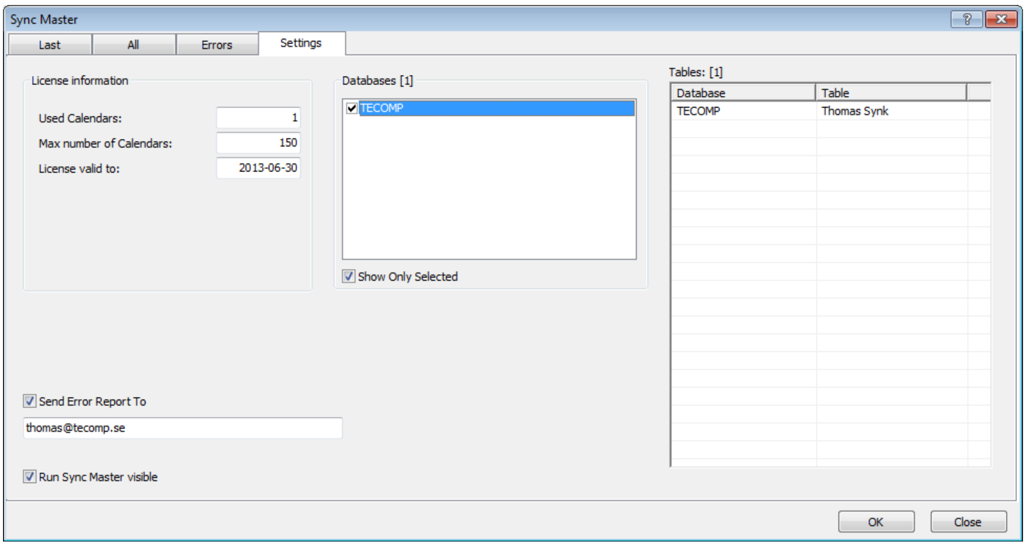
Sync Master

Program Sync Master can handle the sync automatically. This program is an extension to Easy Planning as a separate program that you install on the server. The program is running by Task Scheduler and syncs users' calendars via Exchange.



Settings

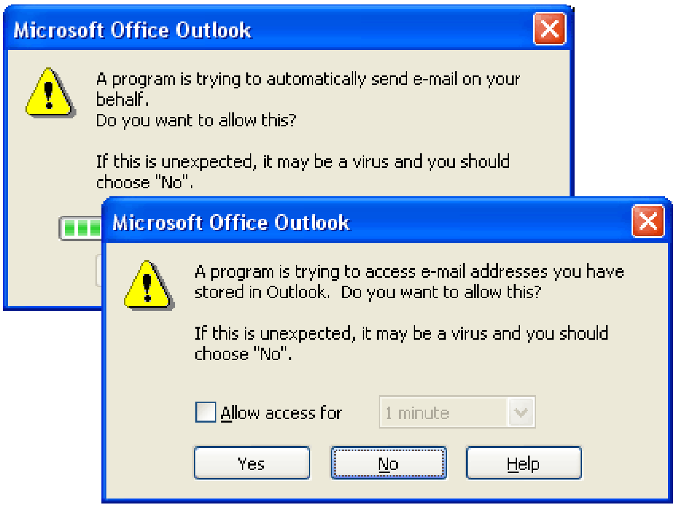
Sync Master is integrated with Easy Planning as both settings and results are controlled from Easy Planning. The settings for Sync Master is done in menu Tools – Outlook – Setup Sync Master. The Settings tab can only be showed for users with permission level 5.



You select one or more databases that you want to sync. When a database is selected, the list on the right will be updated with the tables that are selected to sync from this database.

Outlook security

Because of Microsoft safety barrier that was introduced in Outlook 2002 you need to install **Advanced Security for Outlook**, a freeware program from MAPI Labs. The program is an add-in for Outlook that solves the problem below.



Note! You have to check 'Run Sync Master visible' and then run Sync Master manual once after every update of Sync Master. This is because the program have to approve that Sync Master will get access to the Exchange accounts.

The check 'Run Sync Master visible' must be unchecked if Sync Master is going to run when the server is not logged in.

Status and error logs

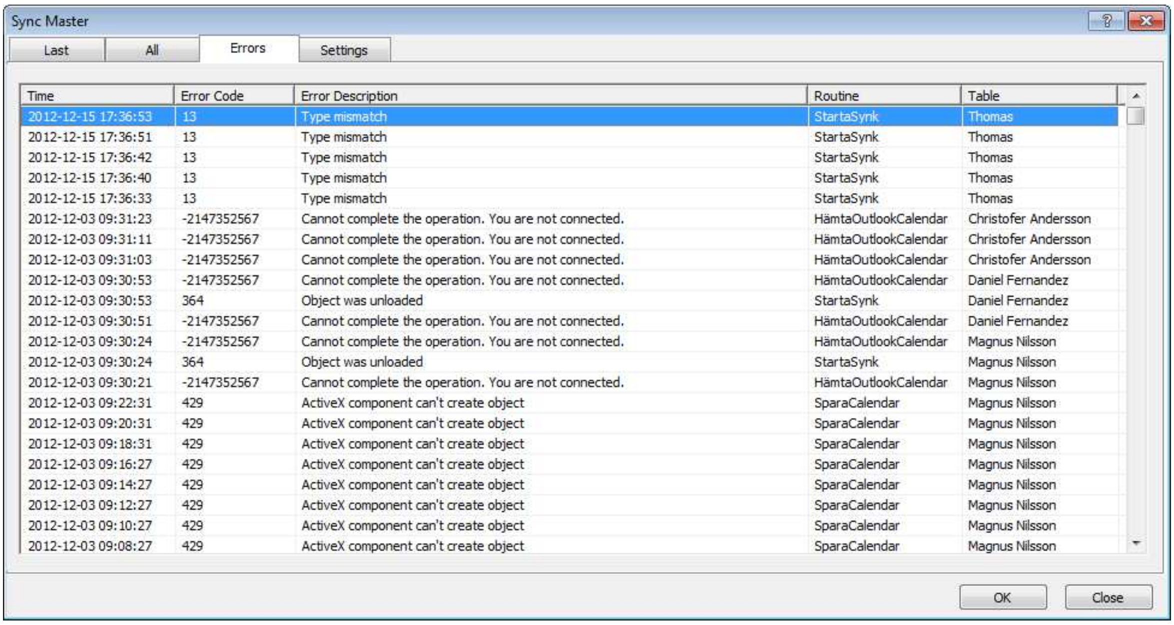
You see the result of the sync on the tabs Latest, All and Error.

- **Latest** show the tables that were synced last. Here you can see the time it took to sync each calendar, status OK if no errors.

- **All** show the total time for Sync Master to sync all tables in the list. You see the number of tables and any errors that occurred.

- **Error** list all errors occurred. Here you can see the time when the error occurred, error codes and error descriptions. Also the program procedures and table names that were syncing when the error occurred.

Examples of errors can be that an Exchange account is not distributed, only distributed for reading or that the Exchange account is missing.



Time	Error Code	Error Description	Routine	Table
2012-12-15 17:36:53	13	Type mismatch	StartaSynk	Thomas
2012-12-15 17:36:51	13	Type mismatch	StartaSynk	Thomas
2012-12-15 17:36:42	13	Type mismatch	StartaSynk	Thomas
2012-12-15 17:36:40	13	Type mismatch	StartaSynk	Thomas
2012-12-15 17:36:33	13	Type mismatch	StartaSynk	Thomas
2012-12-03 09:31:23	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Christofer Andersson
2012-12-03 09:31:11	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Christofer Andersson
2012-12-03 09:31:03	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Christofer Andersson
2012-12-03 09:30:53	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Daniel Fernandez
2012-12-03 09:30:53	364	Object was unloaded	StartaSynk	Daniel Fernandez
2012-12-03 09:30:51	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Daniel Fernandez
2012-12-03 09:30:24	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Magnus Nilsson
2012-12-03 09:30:24	364	Object was unloaded	StartaSynk	Magnus Nilsson
2012-12-03 09:30:21	-2147352567	Cannot complete the operation. You are not connected.	HämtaOutlookCalendar	Magnus Nilsson
2012-12-03 09:22:31	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:20:31	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:18:31	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:16:27	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:14:27	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:12:27	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:10:27	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson
2012-12-03 09:08:27	429	ActiveX component can't create object	SparaCalendar	Magnus Nilsson

For more information about Sync Master, see www.tecomp.se.

MISC. FUNCTIONS

Milestones

To add a milestone, create a task with duration 0 d and same start/end date.

Deadline

You can set a date for a task or project to keep track of its finish date. The program updates the schedule as needed, keeps track of deadline dates, and shows an in the first column if a task finishes after its deadline. Deadline is indicated with a green arrow.

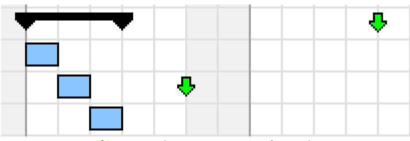


Fig. Deadline shown for both a project and a task

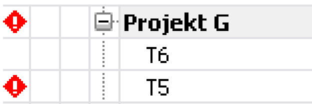


Fig. Project or task that pass deadline showed with a red symbol

There is a custom report 'Tasks passed deadline' under File – Print – Reports.

Replanned

A replanning happens when you move a task or change a resource. Date, cause and changed by can be stored for up to 5 replannings per task. You activate the function in the maintenance menu, View tab, 'Ask before replanning'.

If you move a task or change a resource you need to enter a reason for the replanning. You can choose between three different reasons (you can change names on these) or cancel. There is also a box 'No registration' to force if you do not want to store the changes.

You can view the tasks that have been replanned by clicking on **Replanned** in the toolbar.

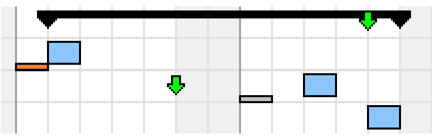


Fig. Replanned tasks in 3 different colors

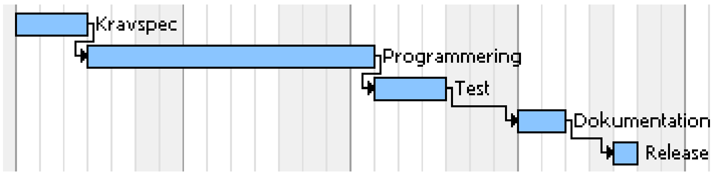
- Other cause (grey)
- Customer (brown)
- Vendor (blue)

There is a customer report 'Replanned tasks' under File – Print – Reports.

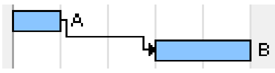
Create task links

You can link any two tasks in a project to show their relationship (also called a task dependency). Once you link the tasks, every change you make to the previous task affects the next task, which affects the next one, and so on.

Note that you can also move a project with drag and drop on the project line. Only the tasks that are still active will be moved, not completed.



A link is showed as a line between two tasks which are connected with an arrow. The arrow indicates that this task has one or more previous tasks. Number of days between those tasks remain if you move the previous forward or backward (eventual delay will be compressed at first, which means, if it is 2 days between two tasks those days will disappear when you move forward). If these days shall remain you need to enter a delay (lag time).

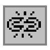


Some tasks may need to be finished before other tasks can start. You can use Finish-to-Start (FS), which means that task B will not start until task A is done.

To create a link

1. Mark the task that is going to have a link (A). Click on the bar or in the column Task name on left.
2. Press and hold **CTRL** and mark the next task (B).
3. Click **Add Link**.
4. A link will be created between the two tasks.

To delete a link



1. Mark the task that has a link which shall be removed (the task with an arrow).
2. Click **Delete link**.
3. The link will be deleted.

Or you can remove a link by pressing F7, and under the Previous tab mark the line (link) that you want to remove and press DELETE.

You can mark several tasks at the same time with CTRL. Links will be created in the order you mark them, for example row 7, 12, 3, 15.

Lag time and lead time

You can enter **Lag time** as a delay between the previous task and the start of the following task. You enter the delay as a positive value, +2d.

Lead time is the overlap between tasks what are linked. If a task is starting when the previous task is unfinished you can enter a Finish-to-Start-connection with a lead for the following task. You enter the lead as a negative delay, -2d.

To add a delay

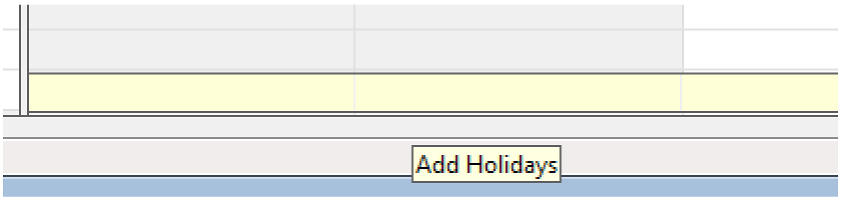
1. Click on the task where you want to add a delay. Double click on the bar or in the column Task name.
2. Press the **Previous** tab.
3. Double click on the task you want to change delay.
4. Increase the time in days to create a delay between the tasks.
5. Press OK for save.

Public Holiday updates

You update public holidays from menu Tools – Maintenance, database tab. Click on Holidays and all public holidays will be retrieved from www.tecomp.se. Easy Planning is shipped with public holidays for Sweden.

You can also manually add you own holidays, do this from Gantt Chart 1 week. Click on desired day on the bottom yellow line and it will be marked as a holiday (grey). By clicking one more time you remove the mark.

The marks are saved to database TIDPLAN.MDB, and is used for all users in all schedules. Only users with level 4 or higher have permission to update holidays.



Add a logo

You can add your company logo, maximum size is 195 x 65 pixels and file extension BMP/JPG/GIF. You select a logo for each database.

Add a logo

1. On **Tools** menu, click **Maintenance**.
2. Login.
3. Click on **Footer** tab.
4. Click on **Set Footer**.
5. Click Add.
6. Select logo, must be of file extension BMP/JPG/GIF and max size 195x65 pixels.
7. The path to the logo is showed in the field Logo.
8. Click **OK** to save.
9. Click **Close**.

Costs

For each task a cost can be added. When the column cost is showed you see the cost for each task on every line, total cost for each project on the projects title line and on the top row the total cost for the whole table. If you filter on a customer the cost is showed for that customer.

To show costs

1. On **Tools** menu, click **Maintenance**.
2. Login.
3. Click on **View** tab.
4. Check 'View Costs'.
5. Click Close.
6. On **Tools** menu, click **Options**.
7. Click on **General** tab.
8. Check columns displayed Cost.
9. Click **OK**.

The cost can be fixed or current. You can count on both costs and income by entering the cost as negative values.

For current the cost is calculated as hourly rate x number of hours. Either you have a general hourly rate (no category) or you can have different hourly rates for each category. You decide the hourly rate for each category when categories are added.

SMS reminder

With the SMS function you get the possibility to efficiently send texts to employees or customers. An SMS is built up as a XML document which is sent to your SMS account.

Note! To use the service (SMS Gateway) you need to get an SMS account at SMS Teknik AB, for more information, visit **www.smsteknik.se**.

To send SMS

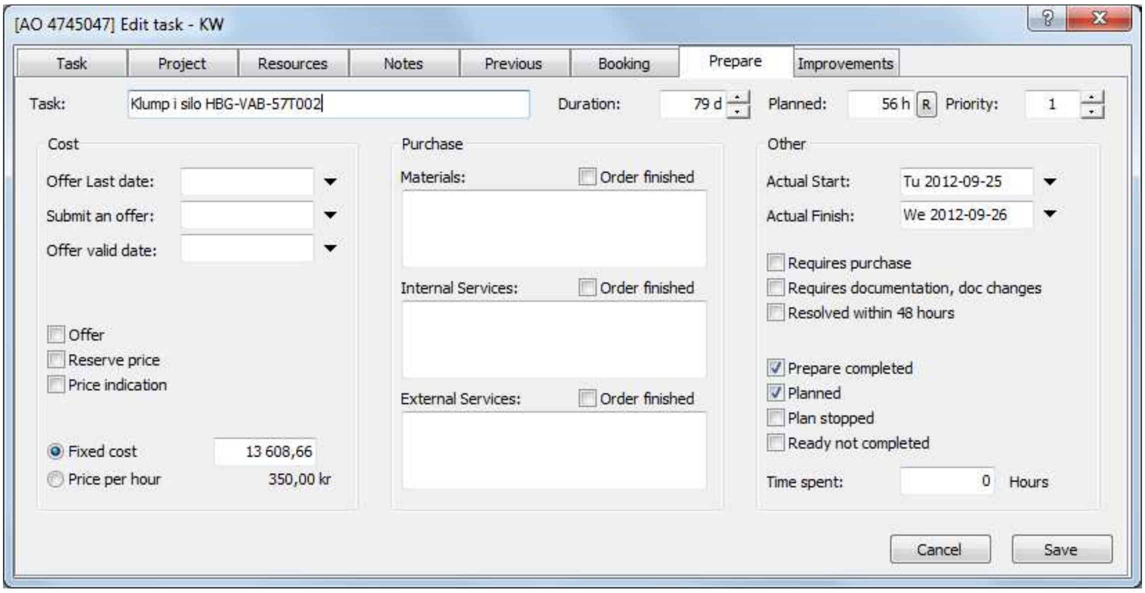
1. On **Tools** menu, click **Maintenance**.
2. Login.
3. Click **Message** tab.
4. Select 'Send message by SMS'.
5. Click on button **SMS.**
6. Enter Sender.
7. Enter message, this text is used if the SMS is going to be sent to an external customer. You can enter <TIME> and <DATE> in the text and these will be replaced with the time and date of the task.
8. Choose who you want to send the SMS to, either Resource or Customer.
9. Enter SMS account, here you enter the data you get from SMS Teknik AB if you subscribe to this service.
10. Enter when you want to send the SMS, choose between send **immediately** or **time delayed**.
11. If time delayed SMS you must enter 2 times, if it is the same day you enter how long time before start the SMS shall be sent and for SMS that shall be sent one or more days ahead you enter a time that day before start time when the SMS shall be sent.

In the form 'New task' you mark send SMS for each task you want to send an SMS.

Options - Prepare

As an option for form 'New Task' you can show the prepare tab. This setting is done in the menu Tools – Maintenance, View tab. The prepare tab is used to prepare work that shall be done. The information is also used for the report 'Statistics work orders' (see Reports).

Normally the bars are blue. Prepare completed gives yellow bars and planned gives green bars.

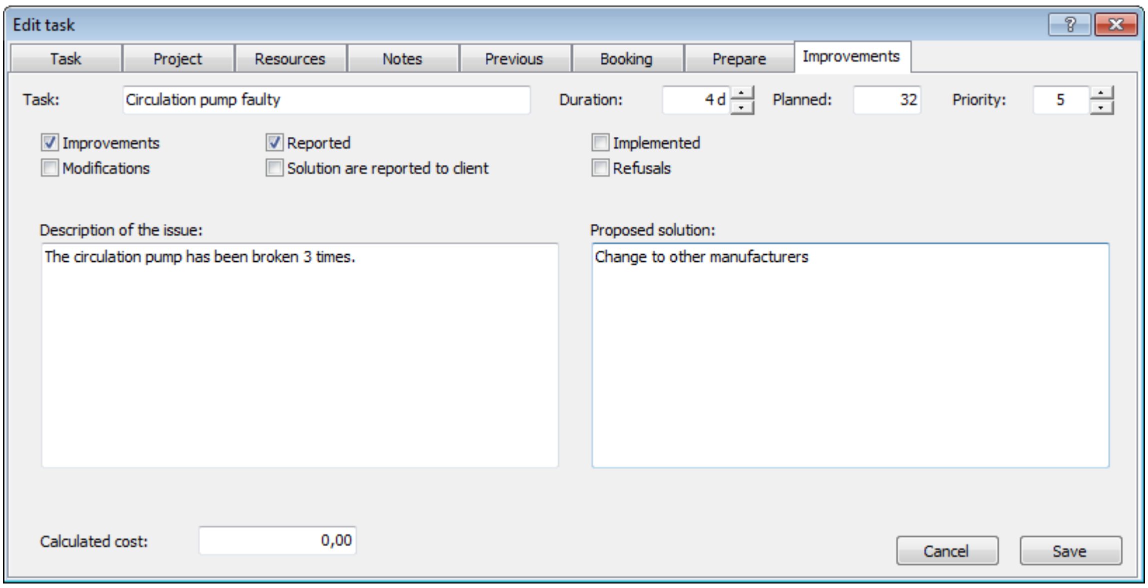


Options - Improvements

As an option for form 'New Task' you can show the improvements tab. This tab is used for improvements. You set up proposals for change, update the status of improvement and present information in an improvement report (see Reports).

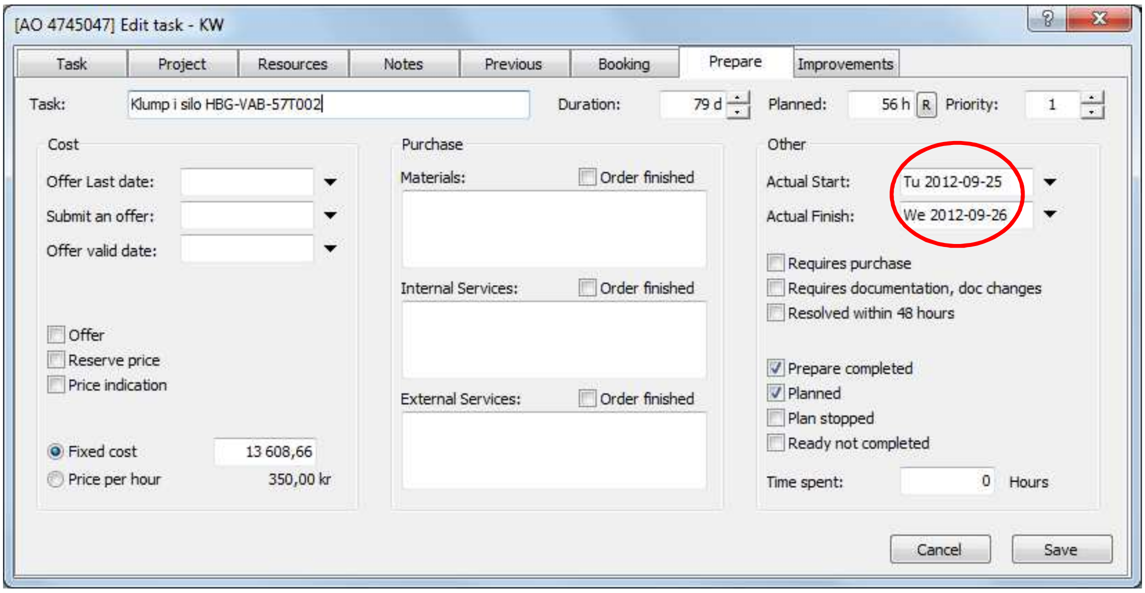
Status steps are:

Improvement/Modifications – Reported – Solution are reported to customer – Implemented/Refusals.

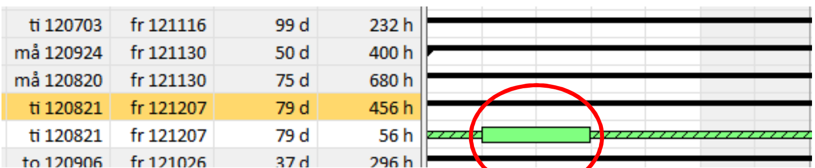


Actual start date

When you import working orders from an external maintenance system is often the planned time entered as a longer time than the period of time to do the job, for example one whole week Mon-Fri when you do not know when during the week the job can be done. The time does not reflect the need. To get a better picture of the workload you can enter an actual time under the prepare tab.



If actual date is set, the **workload will be calculated on the actual time** instead of the planned time. If you later import the same work order again and the time is updated in the external system the actual time is not changed and you can see that the planned time has been moved.



Both when actual date have been entered and when the box is planned and the prepare tab have been checked, the task will be shown in a green color against the normal blue. This is if no category have been chosen, otherwise bars are shown in the color of the category. The color for planned (green) can be changed under Tools – Options, colors tab.

Plan stopped is shown in back and Ready not completed is shown in orange.

Expended time window

Extended time windows means that all booked tasks forward are shown independently of time period shown. These are listed with its task name in the left list but without the bars since they are outside the shown time period.

Press the button 'Extended time window' to show all tasks ahead. This is set per user.

View resource workloads

You can see the number of planned and available hours per day/week/month. The workload for each resource is calculated by adding number of hours/day for each task in the period. You get number of hours/day by dividing the planned time for the task with duration (number of work days). On this way all tasks that falls into the chose period are summed up.

No workload is calculated to linked tables and filtered lists.

There is also a report for workload in group level. The workload is calculated for 1 month, 3 months and 12 months.

To view workload

1. Click on button **'Workload by resources'** (all resources switched to expanded/unexpanded).
2. Or on **Tools** menu, click **Options**.
3. Check '**Workload by resources**'.
4. Click **OK**.

In the figure below the task in line 2 has a duration of 3 days and planned time 24 hours which gives a workload of 8 hours/day. Monday – Wednesday are fully filled boxes with green.

The task in line 1 has a duration of one week and here the planned time is 20 hours. Time is divide by the duration which gives 4 hours/day. Green boxes filled to half for Monday – Friday.

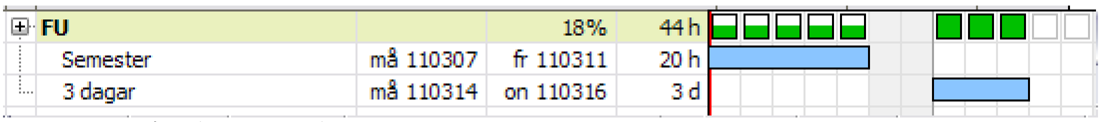


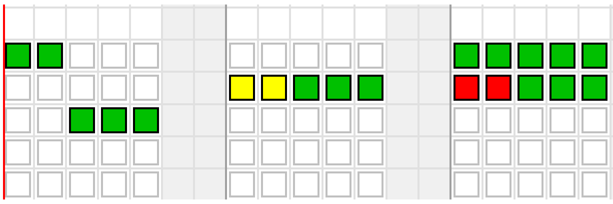
Fig. Workload is shown graphically.

By entering planned time in number of hours you can add a task in your planning and then change duration so that you will not get overbooked. When you pull in the end date of the task the duration rises and when you let go it is calculated again and a new is summed up.

The workload appears on the same line as the resource. If you double click on a resource in the planning view you switch to show single tasks or the workload. Click on minus/plus sign to switch function for one resource at a time.

Gantt, week 1 - 6	show the workload per day
Gantt, week 12 - 36	show the workload per week
Gantt, month, quarterly and half-year	show the workload per month

Overbooked days are showed with a yellow color at 9 hours and with a red color at 10 hours or more.



Workload/day:

1 - 8 hours	Green color
9 hours	Yellow color
10 hours or more	Red color

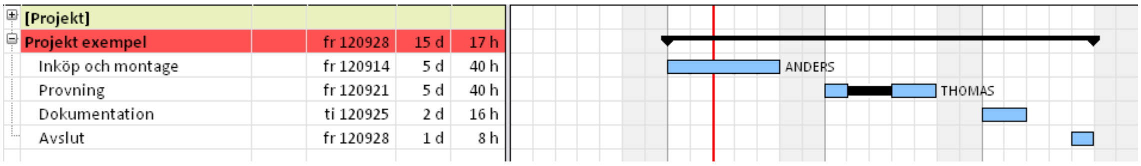
Workload/week and month *

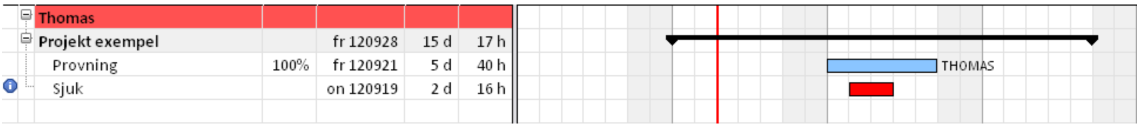
1 - 40 hours	Green color
41 - 48 hours	Yellow color
49 hours or more	Red color

*) For month according to formula: (SumMonth / duration) x 5 = hours per week

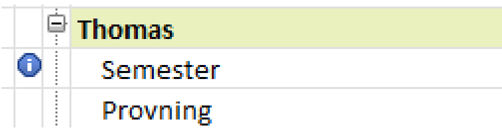
Vacation

When you as a project manager add projects in linked tables you normally do not see if any resource is missing because of vacation. If the resource add a vacation in his table this vacation will be showed in the projects.





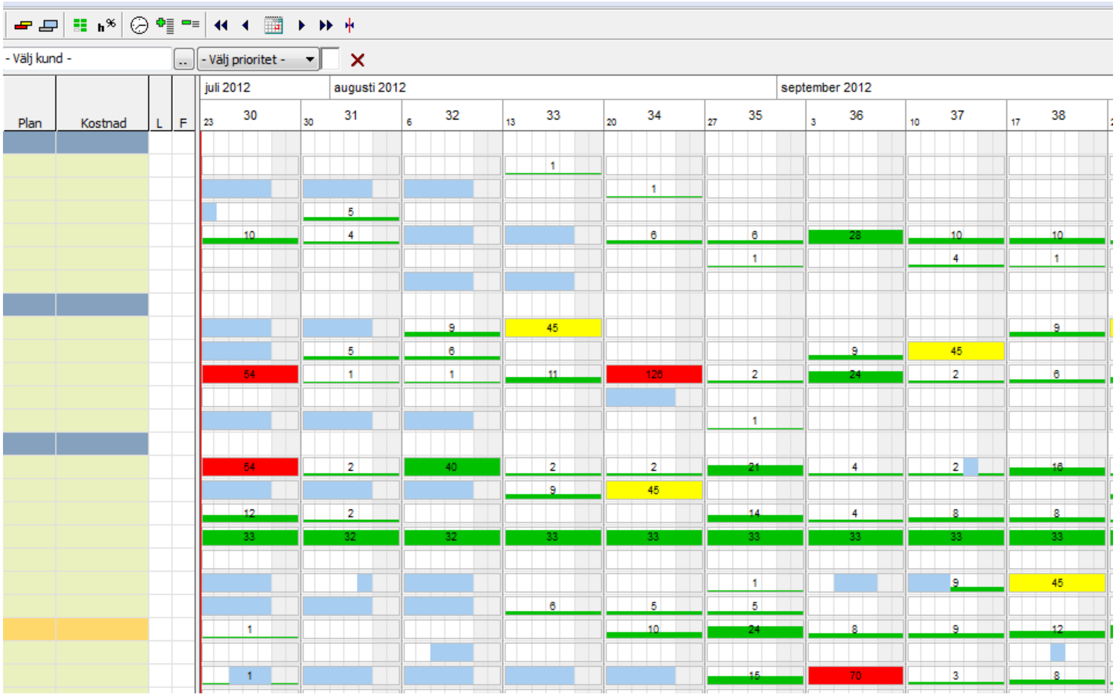
In projects you can see vacations with a thinner black line. If you move the mouse to the bar the tool tips will show which resource is absent in this project. Under the resource the vacation is showed with a blue symbol at workload.



Vacation is used for two functions:

- To show vacation in projects.
- To calculate workload, time available (not used for fixed workload)

To get workload right, you have to enter vacation. You mark vacation in the form 'New task'. Vacations are shown with blue markings.



Automatic logout

There is a function for automatic logout of all users. You can use it for maintenance (for example when updating Easy Planning or compressing the database).

If you activate the automatic logout all users will be logged out and you can login earliest after 3 minutes.

On menu Tools, click Maintenance, Database tab. Check 'Logout all users'. Within one minute you and all other users will be logged out from the program.

Move a table to another database

If a resource need to be moved from one tab to another and the tabs consists of different databases you need to move the resources table to another database.

On menu Tools, click Maintenance, Tables tab. Select the table you want to move in the list and click on 'Change DB'. The table will be moved to the database you choose in the list.

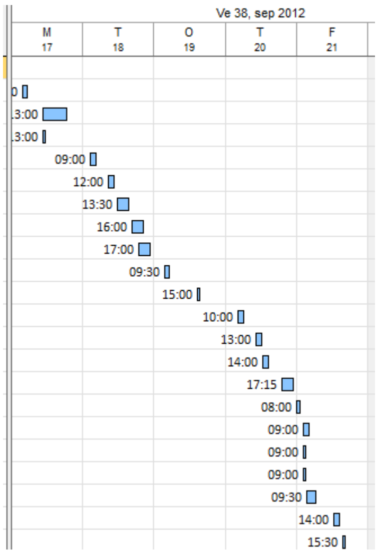
Merge two tables

If you need to merge data from two tables you can do this in the maintenance menu, Tables tab. Select the table in the list you want to move and click on '**Merge Tables**'.

In the form you choose which table you want to move the data. Data will be moved to the chosen table and the marked table will be removed.

Show start time in front of bar

For appointments you can show start time in front of bars in the Gantt Chart. You activate the function in the menu Options, tab Calendar, check '**Show time**'. It is the same function that show times on bars in the calendar view.

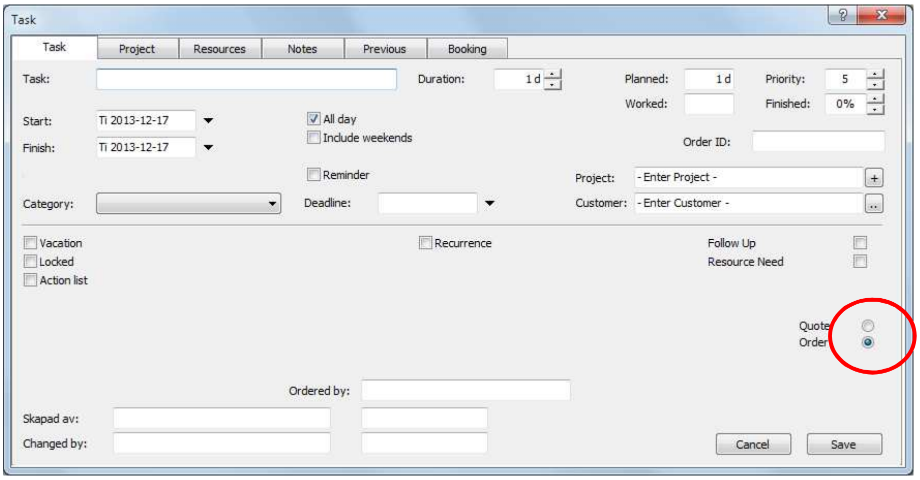


Preliminary book task

You can preliminary book a task in the same way that a project can be preliminary booked. Preliminary booked task appears as a transparent bar, with only the frame. You will find the function under the Task tab.

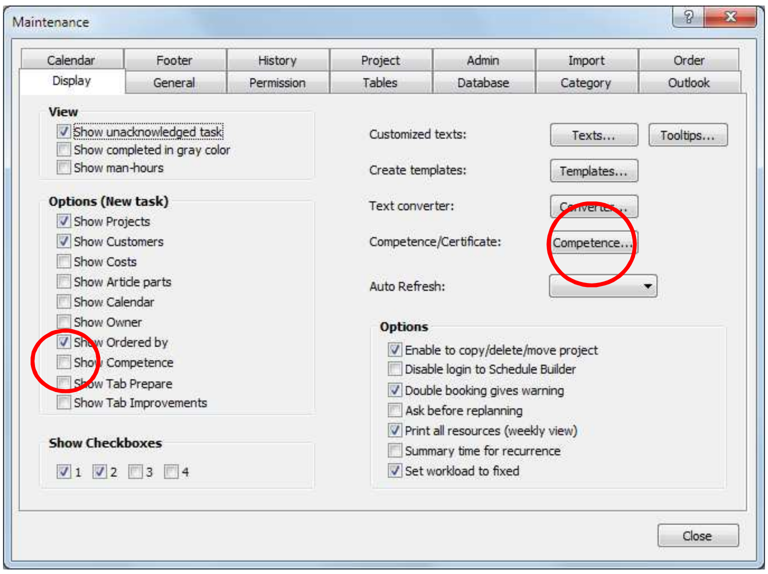
The project quote mode is superior to the task, this means that if the project is in state order the tasks will be showing as preliminary booked but if the project is in state quote all tasks will also be displayed as quote.

Preliminary booked tasks and projects are not included then work load is calculated.



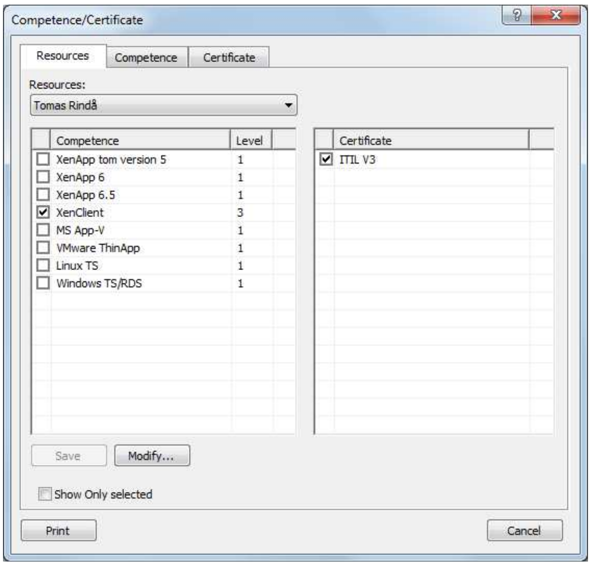
Competency and Certificate

You can create a list of competencies and a list of certificates. These lists can then be used to put the skills levels 1-5 for each user's skills. Create Competencies in the maintenance menu, View tab. Click on 'Competence'.

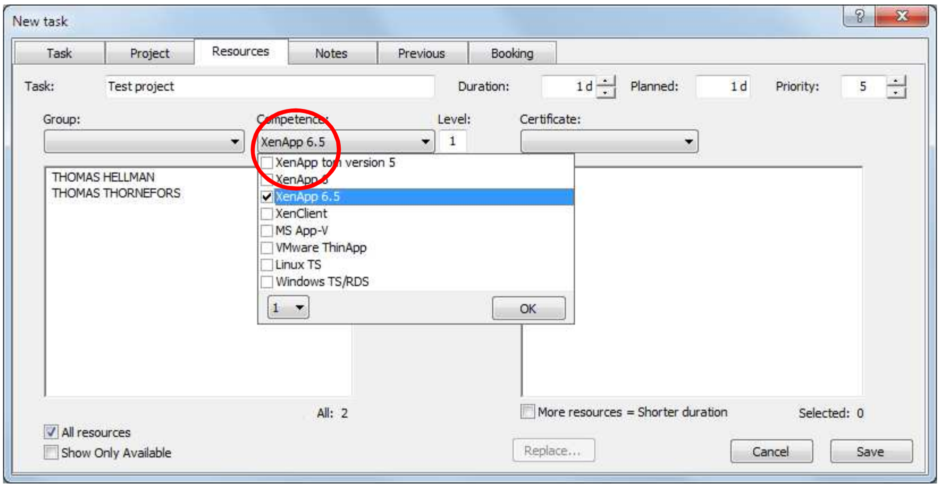


You create a list of competencies under the tabs Competence and Certifications. Then you select a resource in the list on the first tab, and then select the competencies and skill levels this resource to have. Finally, click Save and continue with the next resource.

You can print a skills list for all resources with the **Print** button.



When competencies are registered, you can use them to filter resources when new tasks will be added. Select 'View competence' in the Maintenance menu, tab to view. Note that competences can only be selected for tasks added to linked tables.



In the figure above, select the competence XenApp 6.5 and the list of resources will search for resources that have these skills, resulting in two resources. You can also choose a higher level to further filter out resources.

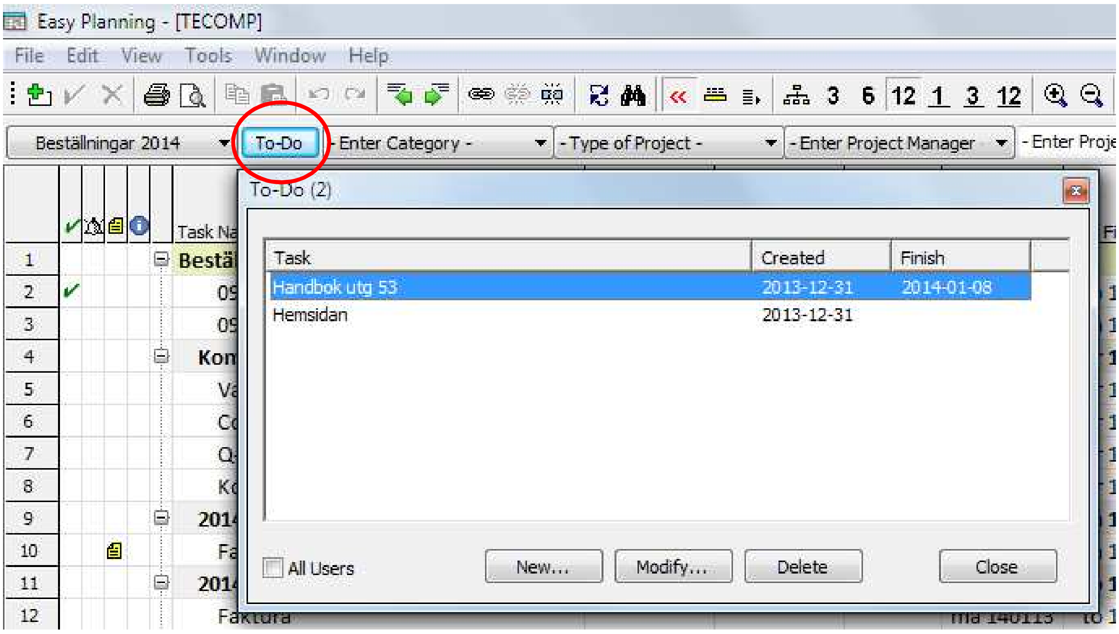
Competence filter can be combined with other filters such as 'Only available', a select group etc.

To-Do list

There is a To-Do list where you can enter incoming job. The list is under button 'To Do'.

Enter a task name and due date (optional). The list is individual and just shows your tasks that you have created.

With permission 5 you can select all users and get a total list. This displays an additional column with the name of the user who created the task.



The list is sorted on the column Created allowing the oldest always shown at the top. You can sort on any column.

The list can be used as a buffer for incoming jobs. When you want to create a task just double-click in the list and get up form for a new task with task name omitted. When saving disappears task from the list.

NOTE To create tasks from the list, you must select the correct table before taking up the list because the save is made to the selected table.

MAINTENANCE

Easy Planning needs normally a minimum of maintenance. If you get problems with long response times the reason may be a table have been damaged, run the database compression that is described below.

Deleting tables

When you delete a name in the schedule the database table is still there. To remove the table from the database, select the menu Tools - Maintenance, Tables tab.

Rename a table

When you change a table name in a schedule that contains tasks and save the schedule the table name will be renamed automatically. You can also rename table names manually, choose menu Tools – Maintenance, Tables tab.

Compress Database

You can reduce the size of the database by making a compression, since the data will be packed together without these gaps after deleted tasks.

Another reason to compress the database is to repair the database. This shall be done if an error occurs that invites you to make a compression. If problems are with TIDPLAN.MDB use the separate button for compression of this database. Tidplan.mdb is used to save the resources profiles.

TIP! If you make a compression regularly you can increase the total size of the database and get a faster system.

Backup database

To create a copy of the current database click **Backup** (see picture below), the file is saved in the same catalogue as the database files with the extension BAK.

TIP! You should make a backup regularly for preventive purposes in case of a disc crash, virus etc. Storage of the backup should be on another server, or another media.

Delete older tasks

To limit the size of the database there is functions which delete tasks that are older than a specified year or limit. Deleted tasks can't be recovered.

Choose between 3 months, 6 months, 9 months, last year, and several years back

Choose a limit and click **Delete**. Tasks that have end date newer than the previous year can't be deleted. This is to avoid that you delete all tasks by mistake. After this action you need to make a compression of the database.

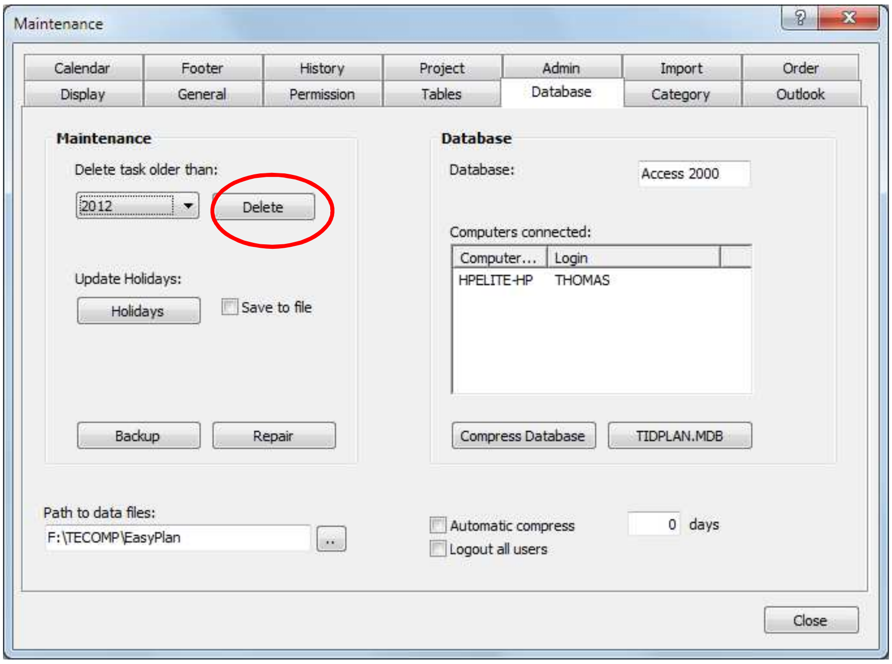


Fig. All tasks with end date before 2012 will be deleted

SETTINGS

Settings for program are divided into two forms, Options and Maintenance.

- Options — personal settings
- Maintenance — for all users (requires login)

Settings - Options

On the menu Tools – Options you can make program settings which are individual for each user. The settings are saved automatically when you press OK. The button Apply updates the screen with the new settings without closing the form.

Tab - View

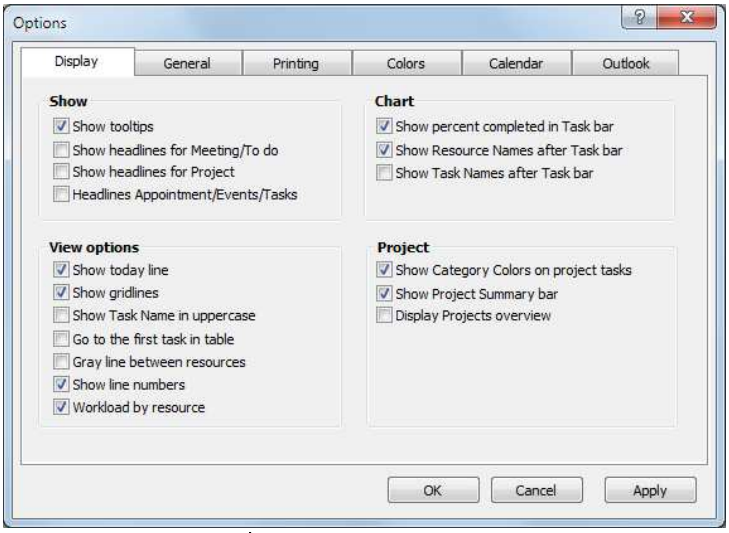
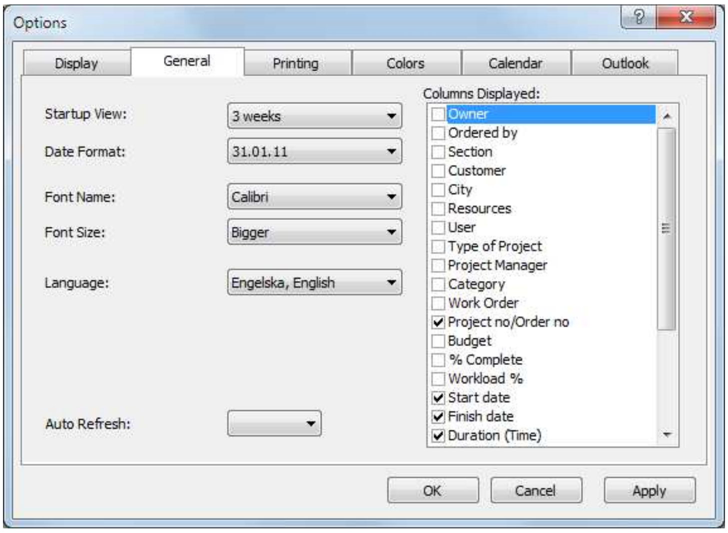


Fig. Program settings under options

Show tooltips	Show/hide the help text that is available for the buttons in the toolbar.
Show headlines for meetings/to do	Show titles for meetings and to do for the Gantt Chart. Uncheck and meetings and to do will be showed together.
Show headlines for project	Show the title Project in the Gantt Chart.
Headlines appointment/event/tasks	Use these title instead.
Show today line	Mark today with a red line.
Show gridlines	Draw horizontal lines which separate each line in the right part of the Gantt Chart.

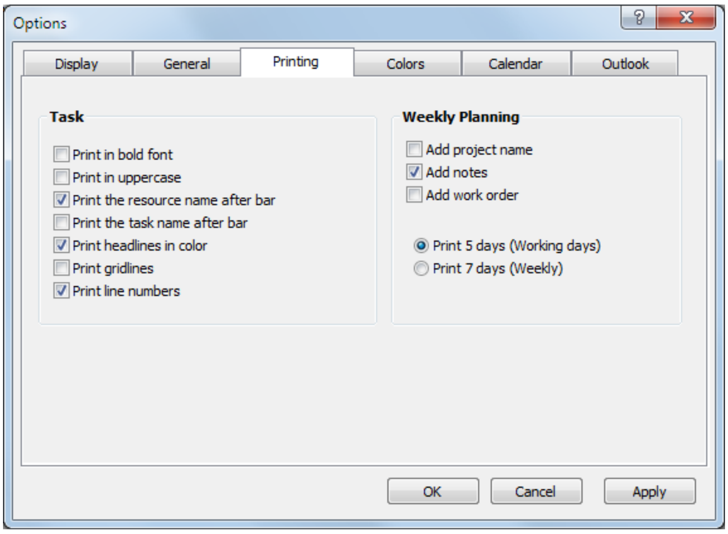
Show line number	Show line number in gantt view.
Show Task name in uppercase	Show Task name in CAPITALS.
Go to the first task in table	Choose this to go to the first task in each table instead of the chosen date.
Workload by resource	Show the workload for resources.
Show percent completed in chart	Show percentage done as a black line inside the chart. Is showed when you have entered worked time.
Show resource name in chart	Show resource name after the bar for tasks from linked tables and for filtered lists.
Show task name in chart	Show the task name after bar in chart.
Show category color on tasks in projects.	Color of the category is showed for tasks in projects as well. If you remove the marking all tasks of a common project will be showed with the color you have chosen for the project.
Show summary bar for project	Show the summary bar for each project.
Show an overview of projects	Show first a list of all projects and then each project is showed with its sub-tasks.

Tab – General



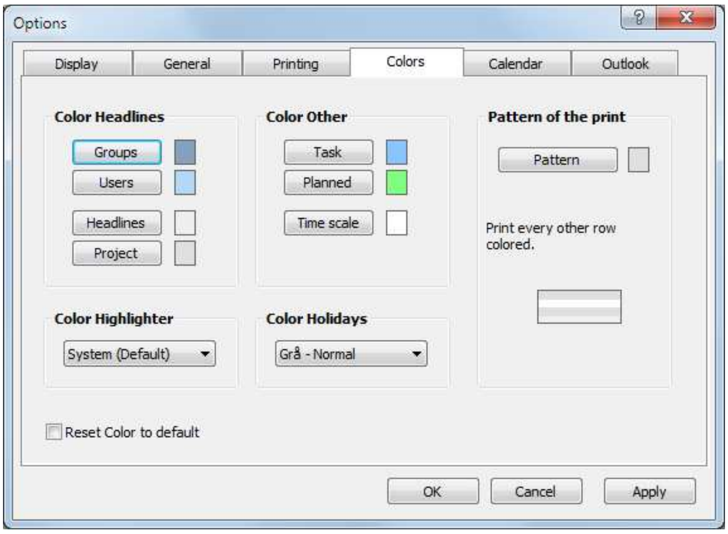
Startup view	Choose start view to show.
Language	Choose language, Swedish or English.
Columns displayed	Choose which columns you want to show in Gantt Chart.
Auto refresh	Set automatic update of current view, range 30-300 sec (0.5 - 5 minutes). The setting is per user.

Tab – Printing



Print gridlines	Print horizontal gridlines in the Gantt Chart for each line.
Print line numbers	Print line number in the first column ID, simplifies the readability.
Print of weekly planning	Choose if project name + task or task only should be printed. Choose if the note field should be printed with the task. Choose if working order should be printed with the task. Choose between printing 5 or 7 days week.

Tab – Colors

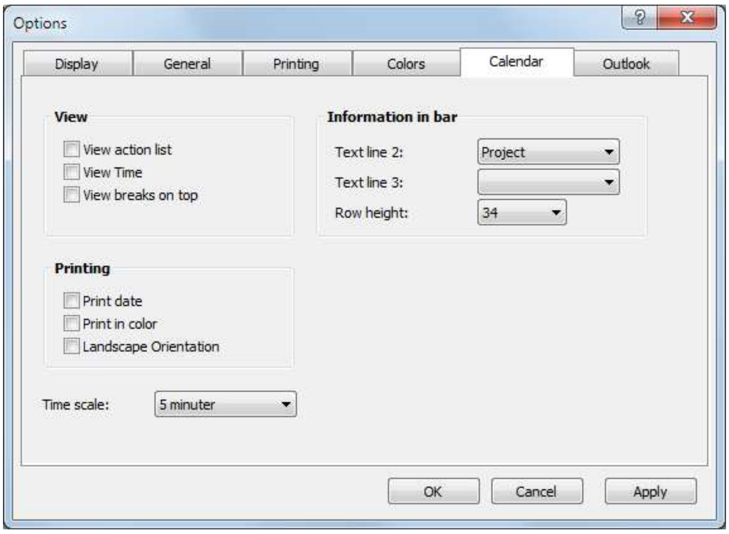


Groups	Color of group name.
Users	Color of resource name.
Headlines	Color of headlines, todo/project/task list.
Project	Color of project name.

Task	Color of task. If category have been chosen the category color is showed instead.
Planned	Color of task when actual date or check planned has been specified.
Time scale	Color of time scale.
Color Highlighter	Color of highlight row in Gantt Chart.
Color holidays	Shades of gray on holidays, both on screen and prints. Choose an appropriate grayscale for the printer you are using. There are other colors than gray to choose from.
Patterns of the print	Pattern of a report from searching database. Odd lines with chosen color, so called pajamas paper.
Reset color to default	Reset colors to default.

If you use only 256 colors the Reset to default will give other colors than if 16bit or 32bit are uses. The colors that can be used with 256 colors to mark holidays start with the text 256, for example. 256 – moss green.

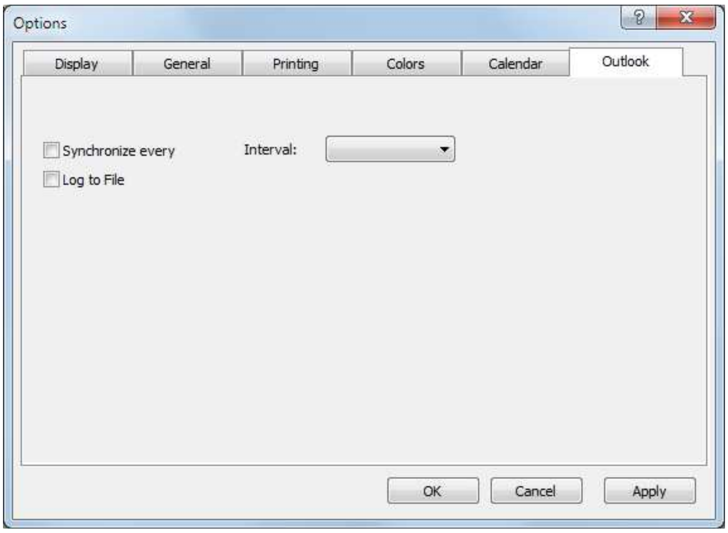
Tab – Calendar



View action list	Show task marked as action list in the calendar.
View time	Show start and end time on bars.
Information in bar	Choose what shall be displayed on row 2 and 3 in the bars. To chow the text you need to increase the row height, 34 for 2 rows and 48 for 3 rows.
Print date	Prints dates in columns along with weekday. For schools, uncheck this option to only print day of the week and period VT/HT.

Time scale	Set step size that the bars increases/decreases when you change a time with drag and drop. Choose a step length from 5 – 30 minutes.

Tab – Outlook

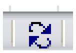


You can sync Easy Planning with Outlook so that all changes that are made in any of the systems are synced with the other system.

To automatic synchronize with Outlook

1. On menu **Tools**, click **Options**.
2. Click on **Outlook** tab.
3. Check **Synchronize every**.
4. Select an interval for syncing, from 15 minutes to 10 hours.
5. The sync will start automatic with the chosen interval as long as the program is running.

When automatic sync is activated an icon is showed on the status line.



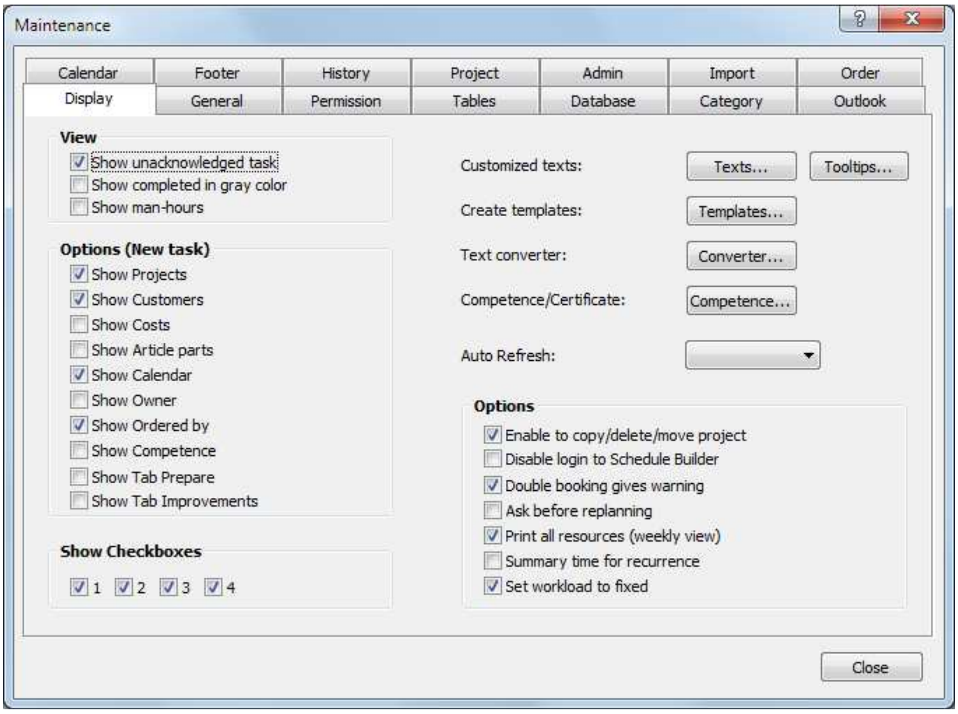
Log to file
Check **Log to file** for analyze. All changes are logged to a text file then synchronizing. File name LogSynk_User.txt.

Settings - Maintenance

All settings made in Tools – Maintenance are for all users.

NOTE! Default password is 1234 to login to Maintenance.

Tab – View

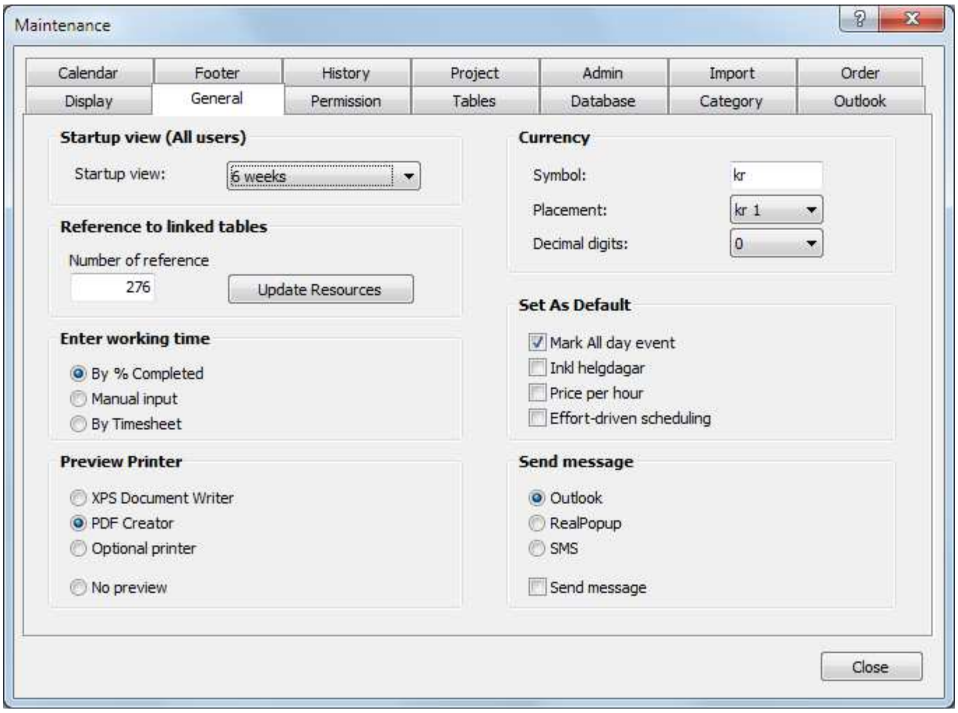


Show unacknowledged task	Shows unfinished tasks on group and resource level. Unfinished tasks earlier than the shown period is marked with the symbol << in the Gantt Chart.
Show man-hours	Shows the tie in man-hours in linked tables and filtered lists.
Enable to copy/delete/move project	Give all users permission to copy, delete and move projects. Observe that the choice 'Show summary bar for project' must be checked in Tools – Options.
No login to Schedule Builder	No logon needed to the Schedule Builder.
Enable double-booked warning	Get a warning of double-bookings when you save tasks that are overlapping times on resources.

If you enable auto refresh, the current view will be updated cyclically in real time, with an interval of 30-600 sec (10 min). Settings are for all users.

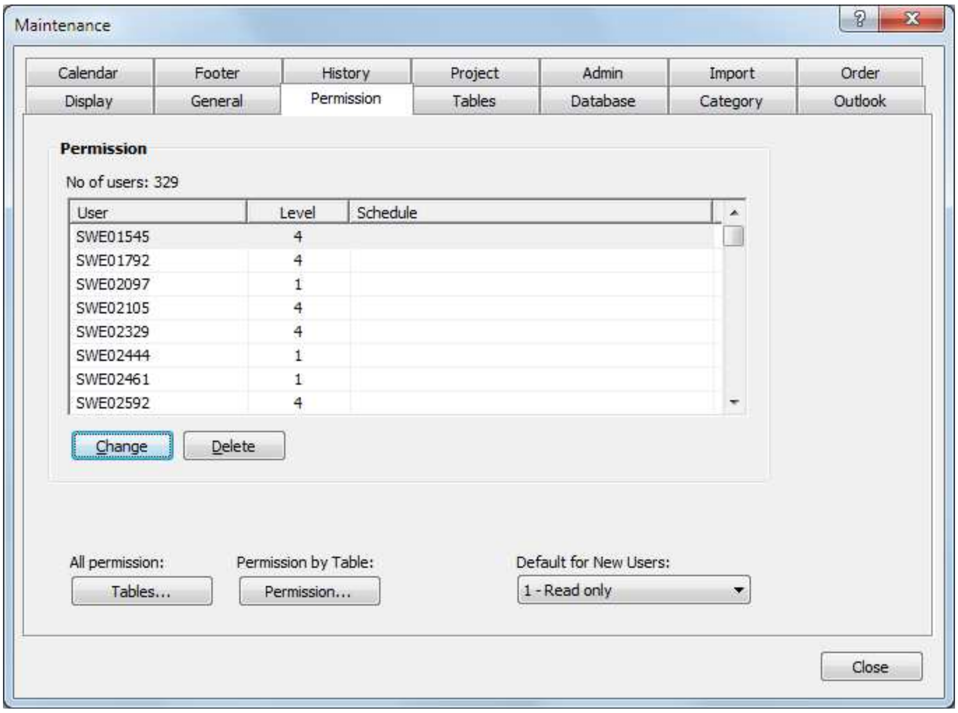
If you want to choose to automatic update only on a special computer you do this in the menu Tools – Options, tab General. If auto refresh are enabled on both maintenance menu (general) and options (per user) the time under options will be used for this user.

Tab – General



Startup view (all users)	You can have a common start view for you schedule. If you enter a common start view it will override your personal choice of start view which you set in the Options menu.
Enter working time	There are 3 different ways to enter time worked.
Currency	Symbol, position and number of decimal places can be specified for currency. Used for showing costs.
Update resource list	Used to update the resource list manually. When you assign resources to your tasks this list will be updated automatically.
Mark All day event	Mark this choice if you want the box 'All day' marked for new tasks.
Preview Printer	Choose a PDF writer for preview.
Create order number automatically	Mark if order numbers should be created automatically for a new task. The order number can be up to 20 characters.
Prefix from schedule file	Mark this option if you have multiple schedules sharing the same series. Prefix becomes the first letter of the schedule.

Tab – Permission



Under this tab you set permission level for each user. In the full version, all new users get the permission selected under 'default for new users', in demo version all users get permission 4.

Delete users

To delete a user, select the user in the list on the left and click on key '**Delete**'. Before the user is removed from the list, you must confirm this. Do you have a license for 3 users, and you have 4 users in the list, you can delete a user if he is no longer using the program.

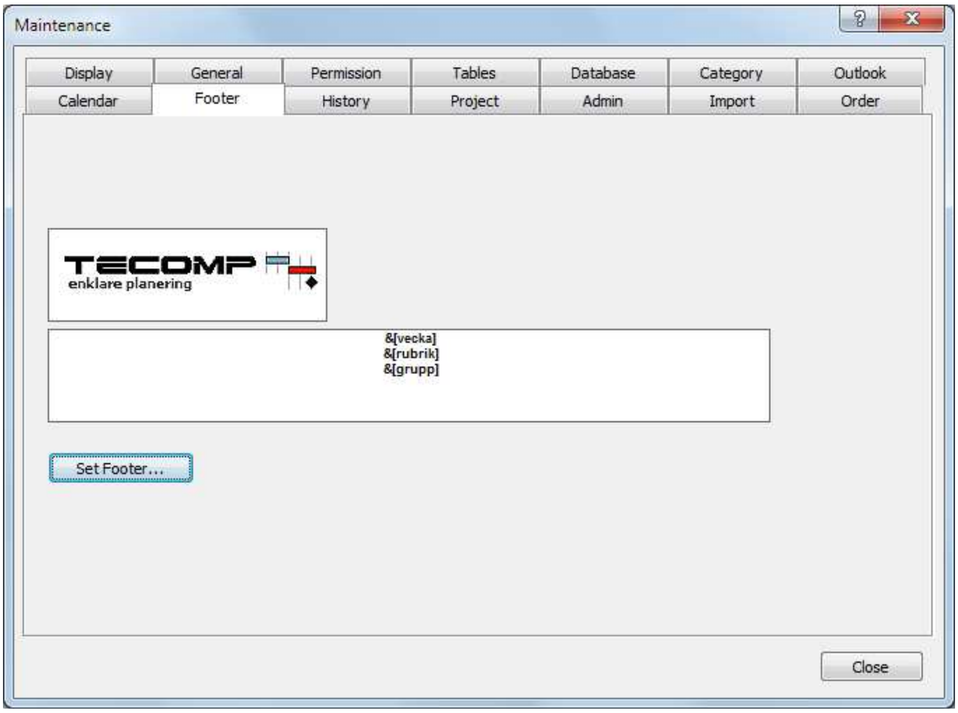
Tables with all permission

You can create a list of tables that you give full permission for, although users only have permission 2 or 3. Useful if your users have permission lower than 4, but should be able to make appointments in some tables. Not valid for users with permission 1.

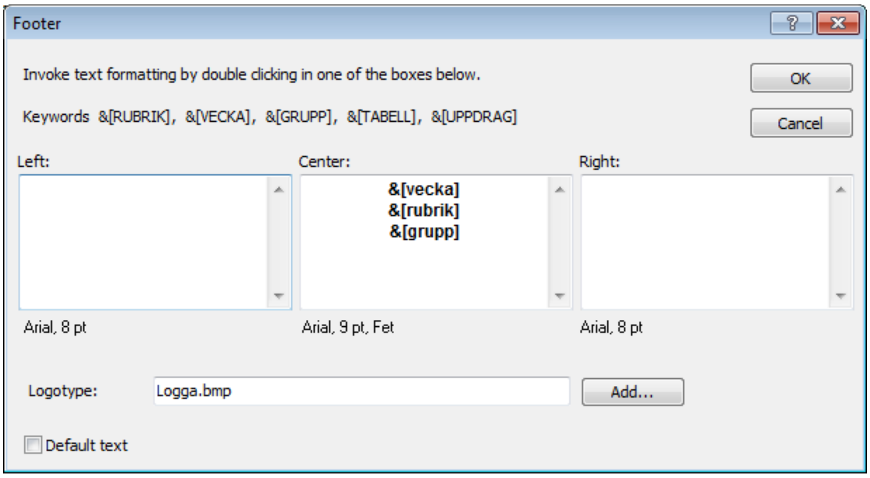
Permission by table

You can specify which resources should have the permission by table. Used when you book tasks in a linked table and select '**Only by permission**' under the Resources tab. Choose Show All, you can still choose from all resources.

Tab – Footer



You can customize the footer with three columns of text. Each column can have any font size and font name.



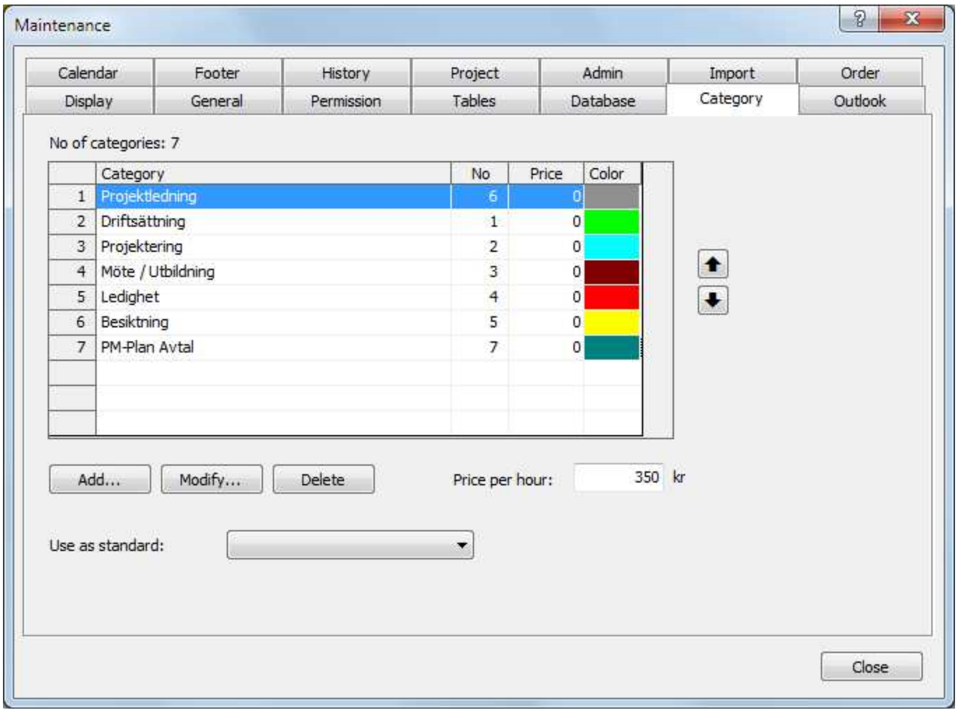
Key words are replaced by the following text:

&[Rubrik]	Heading on the schedule from the schedule builder, field "Department/title'
&[Vecka]	Weekly planning (1 week), 3-week plan (3 week) etc.
&[Grupp]	Replaced with group name.
&[Tabell]	Replaced with table name, not printed at group level.
&[Projekt]	Name of project, printed only when a filtered lists or a project is selected.

Custom logo on printouts

You can add your own logo by clicking on key Add. Maximum size of a logo is 195 x 65 pixels and the file type should be BMP/JPG/GIF. Logo is per database.

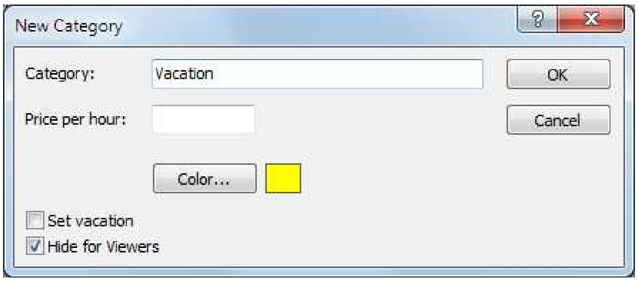
Tab – Categories



With filtered lists you can sort out and show all tasks of a certain type. To use filtered lists you need to create a category list first. Then added tasks, select a category from the category list. Each category can be assigned with a color and hourly rate.

Hide tasks for Viewers

You can hide tasks by selecting 'Hide for Viewers' for one or more categories. Users with level 1 can't see these tasks.



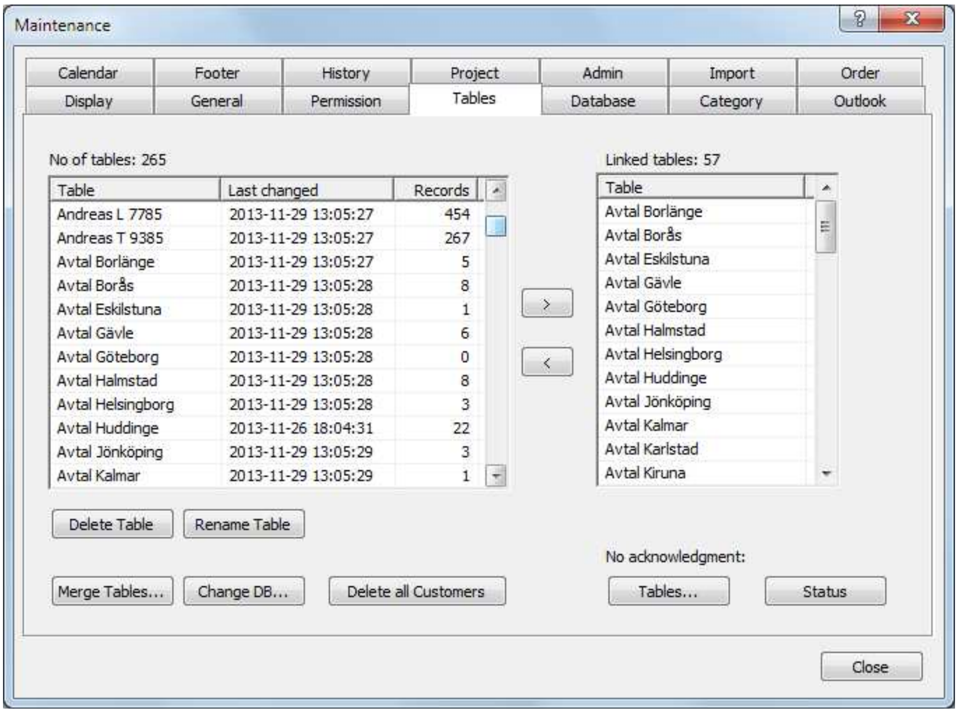
Tab – Project

Add project manager and type of project.

Tab – Database

Functions for database maintenance described in chapter Database.

Tab – Tables



Tab tables show all tables that have been created in the database (except for system tables). Each box in the schedule creates a table in the database. The list contains table name, created date and time and number of records.

Note! For boxes in the schedule that you have marked with a category (filtered lists) there are no tables.

Delete table

Delete marked table. All tasks will be deleted. You need to confirm before the table is deleted.

Rename table

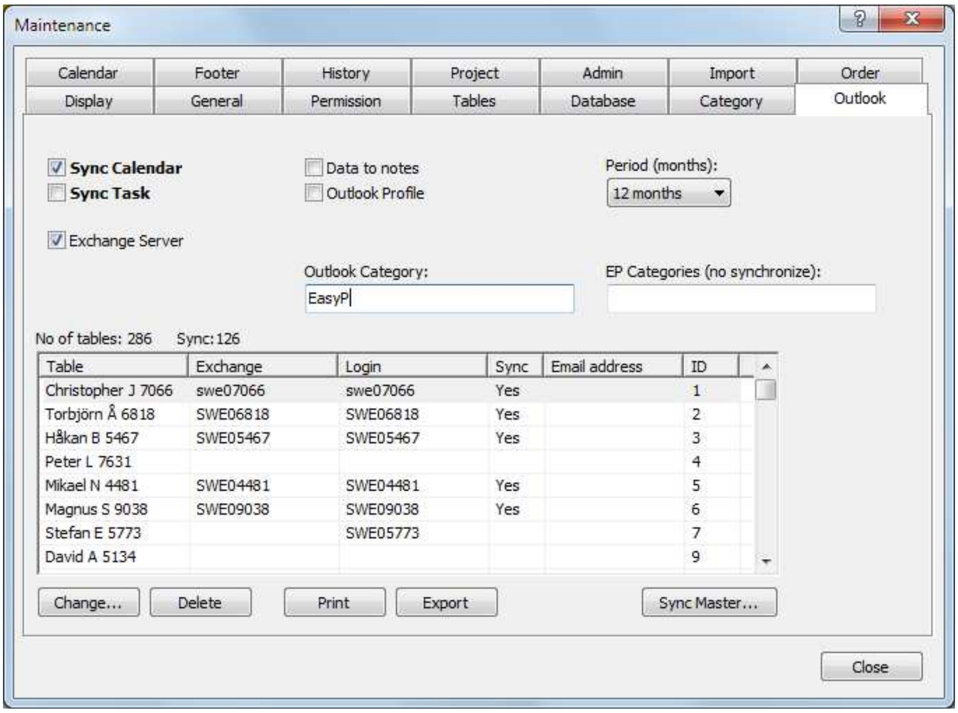
Rename a table name. If you change a name in the schedule that contains tasks the table name will automatically be renamed.

Linked tables

In a linked table you can select resources. The table is different from the others since if you copy a task from a linked table and paste it on a regular table you will create a link (a resource).

Mark a table name in the left list and press right arrow. The table name shall now be showed in the right table under linked tables. You can also use drag-and-drop to select tables.

Tab – Message



Outlook synchronize

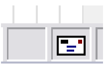
To sync with Outlook, select the 'Sync calendar' and/or 'Sync task'. Want all tasks combined in the Outlook calendar, just select Sync calendar. If you select Sync task will all day events be synchronized with tasks in Outlook (a separate list in Outlook). Check Exchange if you are using an Exchange server.

Select a resource (table) in the lower list and click Change. Enter Column Exchange, login and sync with Sync Master if this program will be used. You can also double-click in the column Sync to quickly toggle sync Yes/No.

Send message

The function **send message** is used to send a message if one user change in another users planning (except for SMS). Have you enabled the feature, that person will receive an email about who and what has changed.

You can choose between using RealPopup, Outlook or SMS to send message. Real Popup is a freeware program that can be downloaded from www.realpopup.it. Real Popup only send message over the local network, which increases data security compared with sending email over the Internet. When 'Send message' is enabled, an icon appears in the status bar.

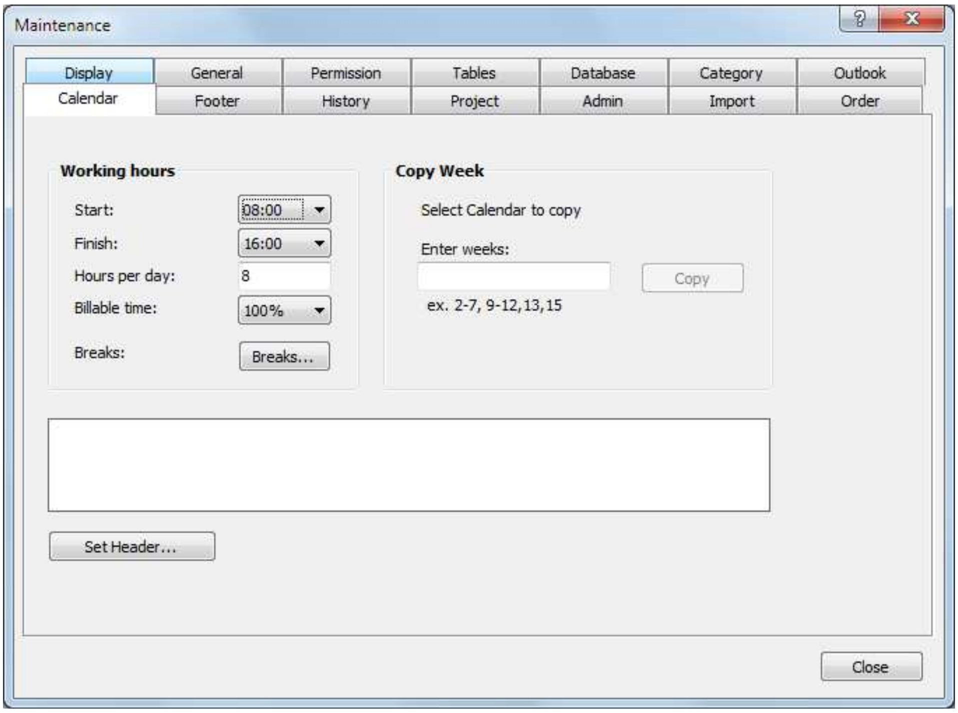


Before you start using the function Send message you have to choose if you want to use Outlook or RealPopup to send messages. If you are going to use Outlook enter an E-mail address for each users table.

If you are using the program RealPopup you must enter a computer name for each user for the network. RealPopup have to be running to be able to send messages. Note that the program RealPopup must be installed in the catalogue c:\program\realpopup to be able to use.

To enable the function send message you mark the box "Send message". You can disable the function by unmark the box.

Tab – Calendar



Working hours
Enter the start and end of the work day. Used for calendar and resource view. Hours per day can be entered, default 8 hours.

Breaks
You can enter up to 3 brakes. These are marked with a gray background in the calendar and resource view.

Copy week
This function is only for schools. It works by allowing you first add all substance for a class in a linked table for one week. You can then copy this week a number of weeks ahead but except for holidays etc.

Note! You can only copy from a linked table (consists of a class for a school).

Scheduling for schools
To create a school schedule you create an schedule in Schedule Building consist of a group of classes, create them as linked tables. Then a group of halls and a group of teachers (these are resources).

Then you can book subjects for a class, choose an available hall and a teacher. When the schedule is booked (only booking first week of the school term) you just copy this week to all other weeks this school term except for school brakes. Then you schedule the next class and so on.

From the schedule you can click on a class, a hall or a teacher and see the bookings for any given week, use the calender view for this.

FILES AND SHORTCUTS

File structure

The following files are installed in the same directory as the program

WINEP6.EXE	Program
WINEP6.CHM	Hjälpfil
WINEP6.EXE.MANIFEST	För WinXP utseende
WINEP6.DAT	Licensfil (Ingår ej i demoversion)
PROJEKT.CFG	schemafil (demo)
PROJEKT.MDB	databas i underkatalog databas (demo)

Sub directories

c:\Program Files\Easy Planning
\Databas
\Status
\Tid

Installed in the Windows System Directory

COMCTL32.OCX	
COMDLG32.OCX	
DAO360.DLL	Program\Delade filer\Microsoft Shared\DAO
GRID32.OCX	
MSCOMCT2.OCX	
MSCOMCTL.OCX	
MSGHOO32.OCX	
MSHFLXGD.OCX	
MSLDBUSR.DLL	
MSSTDFMT.DLL	
MSVBVM60.DLL	
PICCLP32.OCX	
SCRRUN.DLL	

Keyboard shortcuts

Help	F1
Schedule	F2
Planning	F3
Timesheet	F4
Go To	F5
Database	F6
Edit task	F7
Gantt Chart 3 weeks	F8
Resource view 5 days	F9
Calendar	Shift+F9
Zoom in	F11
Zoom out	F12
New Task	Insert
Delete tasks	Delete
Complete tasks	End
Undo	CTRL + Z
Redo	CTRL + Y
Cut	CTRL + X
Copy	CTRL + C
Paste	CTRL + V
Find	CTRL + B
New	CTRL + N
Open	CTRL + O
Save	CTRL + S
Print	CTRL + P
Scroll a page in planning	Space
Forward one week	Right arrow
Backward one week	Left arrow